



## **ELDERLY AND VULNERABLE CLIENT CARE STATEMENT**

### **Introduction**

The firm recognises that it is especially important to treat older and vulnerable clients, their families and representatives, with additional consideration, by being both sympathetic and sensitive to any issues they may have. We are committed to ensuring that our firm and its' staff treat older and vulnerable clients, their families and representatives with dignity, kindness and respect at all times.

### **Meetings and communication**

Due to the nature of the advice that we may need to give, it is important that we can see our client alone initially. However, we appreciate that some clients may prefer to have a trusted friend or relative present, so we will try to accommodate this where we can. At some point throughout the process, we will need an opportunity to see our client alone, but we will do our utmost to make sure that the client feels at ease, and understands why this is necessary. A record is kept of persons present at the meeting and is confirmed in writing after the meeting has taken place. If the client declines to have anyone present, this is also documented and confirmed in writing

Where English is not the first language of our client, they have difficulty hearing or with sight, we suggest that an appropriate independent interpreter assists to help them understand what is being discussed. Alternatively, a person that our client trusts may assist them. Further, we endeavour to ensure that we explain things and write to our clients in plain English. However, there are occasions where legal terminology must be used. Where this is the case, we take care to ensure that clients understand what has been said and will not proceed until we are satisfied that they are comfortable. Correspondence and documentation can be produced in large print or Braille if required. Our main priority is to ensure that clients understand what is happening. If at any point we have concerns about this, we will discuss those with you and suggest an appropriate course of action.

We will take steps to make ourselves aware of any potential capacity or physical limitations such as mobility, continence, hearing or visual impairment. These matters are always taken into account when meeting and communicating with older and vulnerable clients. There may be instances in which we consider it appropriate for a capacity assessment to be undertaken by a medical expert and a report obtained in order for us to properly consider whether a client has capacity to provide instructions for a particular matter. Where this is the case we shall discuss those requirements with you and consider next steps.

In all cases, the pace and duration of each meeting is aligned to the needs of our client. Where appropriate, we will offer to visit our client's home. However, if a client visits our office, we will let them know what disabled parking facilities and access are available and ensure that toilet facilities are readily accessible. All meetings will be recorded by way of an attendance note which will detail key facts and points discussed.

### **Obtaining ID**

We are sensitive to the possibility that older and vulnerable clients may be discomforted if they do not have current passports or driving licences. Alternative document options will be made available to clients who do not possess current photo ID. We will discuss these options with any clients this affects. The type of matter on which we are instructed will be taken into consideration and the documents requested will be proportionate to that. Thereby, ensuring that clients feel comfortable and we still meet our obligations under Money Laundering Regulations.

### **Attorneys**

In the case where an individual is providing instructions to us or signing documents in their capacity as attorney for our client, we ask that they also provide us with copy ID for identity verification purposes. In addition, we will require sight of the Power of Attorney signed by the client appointing that individual to act on their behalf. Whilst an attorney may provide instructions on behalf of a client, we have a duty to ensure that those instructions reflect the true wishes of our client and that those instructions are in the best interests of the client. Any concerns in this regard will be raised with the firm's Compliance and Risk Manager and Practice Director. We will then consider whether it is appropriate to notify other authorities/individuals of our concerns.