Client Care Policy
(Including Vulnerable Clients)

We have duties to care for clients, society in generally, the firm, the Court, each other, our bank, our insurer, ourselves as individuals and others.

If you suspect or lease of any matters that are likely to damage the interests of any of these, raise them with your Head of Department, the Practice Manager or Mr Morrison.

If none of these is appropriate e.g. because you think that one or more of the partners are already involved in the matter, then consult the SRA helpline on 03706 062 555 (8am-6pm Monday to Friday (9.30am-6pm Tuesday)).

Particular care must be taken when assessing if a client is classes as vulnerable, this could be through a variety of factors, but the main groups would be those whole lack the mental capacity, clients with disabilities or those under duress.

If a fee earner or other staff dealing with the client has concerns these should be relayed to the fee earner and the practice manager. Where a vulnerability is identified, appropriate steps must be taken to better assist the individual in way which is beneficial to their experience.

Abused Clients & Modern Slavery

As part of our duty of care towards clients we must be aware of and on the lookout for possible cases of abuse. Abuse can come in many forms such as:

Physical – A client visiting the Matrimonial department who appeared to have uncommon or un accidental injuries

Financial – A client under pressure from family or a partner to leave money in a will or transfer property to them

Mental – A client who has been made to feel as if they need to do this

These are just a few examples of abuse, and any concerns should be directed to the Risk Manager (BA)

Along with this we should be aware and looking for signs of Modern slavery again any concerns should be taken to the risk manager, even if it turns out to be nothing it is better we have looked into it and avoided possibly missing abuse or slavery. More can be read in our Modern Slavery statement.

All staff are inducted in our client care procedures. All amendments to client care procedure are communicated to all staff as and when necessary and our standard documents are centrally updated to reflect changes.

1. Enquiries from potential clients are dealt with by the conveyancing department and basic details taken to enable a conflict check to be conducted and ensure we can act. Details will include clients name and address, the nature of the work and the anticipated timescales.

2. Before taking on client the department will refer to the SRO as necessary if concerns are raised about the nature of the work, the timescales or the department's ability to deal with the matter in any way.

3. Confidentiality and GDPR rights are communicated to the client by way of terms of Business. We comply with all current legislation in the most practical manner and copies of our GDPR notices and policy are annex to this document.

4. We attempt to respond to all correspondence in a timely fashion, be that written, electronic or verbal correspondence. Of course, it is not always possible to return a call or email immediately and wherever a f/e is aware that they need to respond to correspondence they must make reasonable efforts to do so or as a colleague to do so on their behalf.

5. Where we need to refer clients to third parties we will do so after discussion with the SRO to ensure that the referral is appropriate. We do not pay referral fees nor receive any which might cloud our judgement in referring clients to experts and third parties. We have a list of third parties that we would use for various enquiries such as mining investigations, Mundic reports etc.

6. We accommodate clients as much as is practical through reasonable adjustments and have wheelchair friendly offices in Redruth and a car park situated directly behind the offices. We also offer home visits. We can also offer clients large print letters and other documents if needed and are able to assist those clients whom might struggle with literacy, by explaining letters and documents to them in detail. We will deal with each client on an individual basis and where we can adjust our service to meet a client's needs, we will do.

7. We use key dates and workflows for all conveyancing transactions, this enables us to produce details information for clients each time a step on the conveyancing process is completed. At the initial contact with the client, we will try to establish the client's needs and wants in respect of communications. Some clients whom we have acted for several times in conveyancing transactions are more comfortable to be updated only at significant points in the transaction whereas others will need more detailed frequent updates. F/e are responsible for agreeing with clients the appropriate level of communications.