WILLS, TRUSTS & PROBATE OLDER AND VULNERABLE CLIENT CARE PROCEDURE



Fosters Solicitors are a friendly, reputable firm with client care at the heart of our ethos. We are sensitive to our clients' needs and aim to offer the best possible adjustments in our service to cater for age and health-related impairments or disabilities.

On this basis, we offer the following assurances to our older and vulnerable clients, their families and representatives:

- 1. Support and encourage clients to make informed decisions.
- 2. Offer home visits/care home visits/hospital visits, where client would prefer not to come to the office and be clear about additional pricing for this.
- 3. Make clients aware of disabled access/ground floor meeting room/office parking as necessary so clients feel comfortable in our surroundings.
- 4. Be sensitive to a client's needs and adapt as necessary, e.g., large print correspondence or speaking louder than usual.
- 5. Ensure client is seen on their own, but also be sensitive to the fact that they may like a family member or trusted person with them for part of the meeting.
- 6. Ensure confidentiality is upheld at all times.
- 7. Where third parties may be needed, e.g., capacity assessors signpost client in the right direction.
- 8. Ensure anti-money laundering requirements are always met and being adaptable to the situation, e.g., asking care home if they have a photocopier that can be used.
- 9. Smile, be welcoming and take time to ensure the client is comfortable and relaxed they may feel nervous and anxious in advance of the meeting.
- 10. Take time to ensure the client understands and if necessary, have additional meetings to satisfy this.
- 11. Offer appointments at times which are best for them (within office hours).
- 12. Ensure all relevant facts are noted in attendance note of the meeting.

Our accredited SFE Members

Our solicitors, Rachel Chiarotti and Charlotte Ranson, are both accredited members of Solicitors for the Elderly (SFE).

For more information about how we can help support you with your legal matter, please contact Rachel or Charlotte on the details provided.



Rachel Chiarotti Senior Associate

Rachel is a senior associate solicitor of the firm with extensive experience in will drafting, estate administration, Lasting Powers of Attorney and general estate planning.

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Charlotte Ranson Solicitor

Charlotte is a solicitor in our Wills, Trusts & Probate team, experienced in a broad range of private client work including wills, probate, the administration of estates and Lasting Powers of Attorney.

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