



## Code of Conduct

### *Initial meeting*

We offer a free consultation, lasting up to an hour, to discuss the potential client's specific needs. During this we will clarify what help is needed, make clear our charging structure, estimated time input, and payment terms. There is no obligation to take up the service, and time is always given for consideration of our proposals or suggestions. Services can be cancelled at any time.

### *Conduct*

We work with honesty, discretion and professionalism at all times. Any suggestions will be made in the client's best interests, and never to exploit the relationship for personal benefit. Carla Lowndes has been checked by the Disclosure and Barring Service (DBS), and holds no criminal record or county court judgements. Work, and time recording, will be carried out in a transparent manner, with communication in writing where necessary.

### *Commission & referral fees*

A list of preferred suppliers is held, however we will not accept any commission, referral fees or gifts from these organisations. Any recommendations made to our clients will solely be in the client's best interests.

### *Capacity*

We only work with clients who have mental capacity to make their own decisions. With the client's permission we like to have contact details of family members or legal representatives so they are fully aware of our involvement. Access to shared email inboxes can be arranged, and copies of timesheets provided for full transparency if required. If we become concerned about changes in a client's capacity, we reserve the right to report this to their family or appointed representative.

### *Gifts & legacies*

Gifts from clients will not be accepted, and any legacy left will be returned to the client's estate. Where it may cause offence to refuse small tokens of appreciation they will be formally recorded for transparency.

### *Privacy & data protection*

Any data held about a client will only be used for its intended purpose. We undertake not to inappropriately disclose any personal information obtained in the course of our work. Every care will be taken to secure electronic and hard copies of all client details. We are registered with the Information Commissioners Office, application number C1484963.

### *Insurance*

Cover of £1,000,000 public liability insurance and £1,000,000 professional indemnity insurance are in place.

### *Invoicing & payments*

Invoices are raised at the end of the month, based on the agreed hourly rate and recorded times. Charges are made in full for the first hour, and then in 15-minute segments following that for home visits. Any expenses incurred, will be highlighted beforehand, and shown on the invoices.

Payment is due at the point of invoice, payment preferred by SumUp card machine in person or via cash or by bank transfer.

### *Complaints*

If our clients, family or representatives are dissatisfied with any aspect of our work, we request that they discuss the issue with us initially, before putting it in writing. We will endeavour to amicably resolve the situation as quickly as possible. Work that has been carried out must be paid for unless it is agreed otherwise.

### *Working with vulnerable people*

We recognise that some of clients may be vulnerable, so adjustments will be made to provide services which can accommodate such needs effortlessly. We will always be mindful of using appropriate language and systems which ensure clients are confident and comfortable with our work. Additional services, which may benefit a client will be signposted if appropriate.

*May 2024*