

Code of Conduct

As a member of the New Leaf Will Writers Federation we are committed to the highest levels of service and adhere to the following Code of Conduct:

Professional Conduct

We conduct all of our activities professionally and with integrity. We take great care to be completely objective in our judgement and any recommendations that we give, so that issues are never influenced by anything other than the best and proper interests of our clients.

New Leaf Will Writers will never intimidate, harass or otherwise pressure clients into transacting business or making a decision. This in no way mitigates the underlying and logical message of importance or urgency that is inherent in every Will and Power of Attorney.

Ethics

We always conduct our services honestly and honourably, and would ask our clients to return the courtesy. Our advice, assistance and the methods imparted through our professional training, take proper account of ethical considerations, together with the protection and enhancement of the moral position of our clients.

A New Leaf Will Writer will never suggest or accept any invitation for him/her (or any person connected to him/her) to be an executor, attorney or beneficiary in respect to any Will, Trust or Power of Attorney that they are drafting.

Duty of Care

Our actions and advice will always conform to relevant UK law, and are aimed at providing the maximum benefit to our clients in the most economical way possible, but always at the highest possible standard. Every New Leaf Will Writer will assist each of their clients in making informed and balanced decisions regarding any of their estate or power of attorney needs.

New Leaf Will Writers will always take reasonable steps to confirm to their own satisfaction that the client is acting freely, without coercion or undue influence, and with sufficient understanding to make an informed decision. If a client decides not to proceed with their contract, the Will Writer should make reasonable efforts, appropriate to the

circumstances, to satisfy themselves that any cancellation is of the client's free choice and without coercion.

Whenever possible the Will Writer will take instructions on a "face to face" basis. When this is not possible he/she will make every effort to establish that the client is acting of their own free will and has sufficient understanding to make an informed and balanced decision. The Will Writer should also clearly establish proof of identity before completion of any Will or Power of Attorney.

Confidentiality

We are committed to maintaining the highest degree of integrity in all our dealings with potential, current and past clients. This applies to confidentiality, and the protection of all personal information received in the course of providing the services we offer. We extend the same standards to all our client's families and any other individual we may be asked to contact.

We will not contact anyone named in any document produced by a New Leaf Will Writer unless:

- required to fulfil a contractual obligation.
- client has given consent e.g: to inform attorney(s) and executors(s) of their role and responsibilities
- to obtain outstanding paperwork required to complete our obligation to the client.

The Elderly, the Disabled and the Infirm

New Leaf Will Writers Federation does not subscribe to the notion that anyone disabled, aged over 65 or infirm automatically classifies them as being "vulnerable". This is condescension of the worst kind and should not be tolerated.

New Leaf Will Writers will always attend a client meeting with the view that the individual has sufficient mental ability or capacity to understand the topics to be discussed. If, however, it becomes evident that the individual is under stress, or is struggling to gain sufficient understanding to make an informed decision the Will Writer will suspend the meeting, and advise the need to involve others to assist the client.

It is New Leaf's policy to always recommend that family or friends are present and involved at all client meetings irrespective of the clients age, marital status or situation.

Prices

Our prices are extremely competitive even though we do provide high quality and personally tailored services to meet individual needs. As such you will find that New Leaf advisers do not offer a fixed price tariff, but prices are generally very similar. That said, individual advisers are always willing to propose solutions which accommodate their clients' available budgets and timescales. It is always our practice to agree our prices and payment method clearly in advance by way of a Letter of Engagement. Once agreed New Leaf prices are fixed and without hidden extras, and your New Leaf adviser will standby that price, provided all relevant and pertinent information has been disclosed.

Payment

We always aim to be as helpful as possible but if we are to continue offering such competitive prices we must insist, as a minimum on a 50% deposit on agreement of work to be done, and the balance upon completion of the documentation. Payment of the deposit implies acceptance of our terms.

Quality Assurance and Guarantee

We maintain the quality of what we do through constant ongoing review of our practices. With regard to any application for registration of a Lasting Power of Attorney, handled fully by a New Leaf adviser, that is rejected by the Office of the Public Guardian any resulting loss of registration fee and the subsequent re-write of forms will be borne by the New Leaf Will Writer.

Equality and discrimination

We always strive to be fair and objective in our advice and actions, and we are never influenced in our decisions, actions or recommendations by issues of gender, race, creed, colour, age or personal disability. Likewise we will never refuse to provide products and services for reasons of gender, race, creed, colour, age or personal disability.

Intellectual Property

We retain the ownership of all intellectual property that we create until fully paid for by the client.

What to do if you have a complaint

If you wish to register a complaint, please contact us:

In writing to:

Compliance Dept, New Leaf Will Writers Federation, Princess Caroline House, 1 High Street, 1st Floor, Southend On Sea, Essex SS1 1JE

By telephone:

01702 431130