Code of practice and conduct

You can have every confidence in Wadham Financial Solutions

Wadham Financial Solutions really do care about you and your family, we fully appreciate that we are meeting you at one of the most difficult times you will ever have to face.

We understand that you have a lot on your plate at the moment, and as such you need to be given clear and unambiguous communications at all times, you also need to be able to place a degree of trust in anyone you are dealing with.

To help you at this time, Wadham Financial Solutions has designed the following code, which we believe will give you and your family that much needed confidence and help establish a mutually trusting relationship with us.

Wadham Financial Solutions shall always:

- Be registered with the Financial Services Authority.
- Provide each and every client family with a dedicated customer charter and a copy of this code at the earliest opportunity.
- Act at all times with honesty and integrity, providing each and every family with the utmost dignity, respect and courtesy.
- Where appropriate, offer home visits as an alternative to an office visit.
- Ensure that they are competent and fully up to date to advise on all aspects surrounding care fees planning.
- Ensure that they conduct comprehensive and detailed fact-finding with every client family, before any advice is given.
- Provide families with the best possible business practice, issuing all the mandatory FSA documents, including their own charging structures at the first meeting.
- Ensure that all relevant and appropriate information is openly disclosed to families, before the completion of a transaction.
- Ensure that all advice given is the most appropriate for their circumstances and, where appropriate, the family will be advised to seek a Continuing Care Assessment.
- Declare any conflicts of interest immediately.
- We will endeavour to follow a plain English policy and communicate in easy, understandable language, avoiding industry jargon wherever possible.
- We are aware that some clients may have hearing and visual difficulties and they should take this into account when communicating, for example, written correspondence should where needed be in large typeface and bold print.
- Where appropriate, encourage all close family members and or attorneys to discuss the advice and the implications of their decisions.
- Where appropriate, liaise with colleagues in other professions, such as solicitors and accountants.

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