

Client Care

TERMS OF ENGAGEMENT





This document highlights essential information, including the Terms of Engagement, but does not replace the quotation or invoice.

What's In, registered as Kidwells Rated Ltd, is part of the Kidwells group of companies including Kidwells House, Kidwells Accountancy, Kidwells Solicitors, and Kidwells Loans.

The group of companies are owned by Managing Director Alan Michael Kidwell-Horne, commonly known as Michael Horne, Solicitor. Together, we can offer support for every stage of your business.

Kidwells businesses operate independently, with no referral fees and no referrals of data without your consent.

We always encourage you to seek independent financial advice and independent legal advice before choosing any products or services with us.

Working with us

When you instruct us to provide a service, you are describing the type of work that you want us to do for you.

It can be daunting trying to find the right marketer or the right level of service for you or your business and making sure everything goes smoothly. It is important that you feel confident and well informed.

To get the best outcome, it is important to make sure you:

- Are clear with us about what you want to happen and what we are going to do for you.
- Understand the costs involved of any instructions you give us.
- Take notes of all conversations you have with us, including:
 - who you spoke to,
 - when you spoke to them,
 - what was said, and any future actions that were agreed, including deadlines.

You will need to:

- Provide clear, timely and accurate instructions.
- Provide all documentation required to complete the work in a timely manner.
- Safeguard any documents.
- Agree to pay costs.
- Tell us as soon as possible of any new information or a change in your circumstances.

Website:

www.whats-in.co.uk

Call Us:

01432 278179

Email Us:

Hello@Whats-In.co.uk

Office Hours:

Monday to Friday 09.00 - 17.30

Address:

Kidwells House
4 Coldnose Road
Rotherwas Industrial Estate
Hereford
HR2 6JL

We will:

- Keep you informed and communicate with you in plain language.
- Explain with what work is required.
- Update you with costs as they are incurred.

If you call the office there may not always be the right person in the position to take the call, but there will always be a member of the support staff who will be able to take your call.

Terminating Your Instruction

You may terminate your instructions to us in writing at any time if you choose. You are required to give 30 days notice. In most cases, you are still responsible for all costs incurred.

This may be because our services are no longer necessary, or you have lost confidence in how we are carrying out your work.

We will be entitled to retain any documents we hold while there is money owing for any charges and expenses.

In some circumstances, we may decide to stop working for you. For example, if you cannot give clear or proper instructions on how we are to proceed; or if you have not paid any interim or final invoice when requested to do so.

We may decide to cease acting for you only with good reason. We must give you reasonable notice that we will cease acting for you which will be determined regarding all the circumstances that exist at the time notice is given.

If you or we decide that we are no longer to work for you, you will be liable to pay our charges up to the date we cease working for work complete.

We will store our file of papers (except any of your papers which you ask to be returned to you) on the understanding that we have the right to destroy it 6 years after archiving the matter in question. We do not destroy documents which you ask us to deposit in safe custody.

Cooling Off Period

As we exclusively collaborate with businesses and not individuals, the cooling off period is not applicable to our services. Therefore, any agreement made between us and our business clients will not be subject to a cooling off period.

Disclosure

Unless a client gives consent to disclosure, confidential information may only be disclosed where the law permits; for example, in some circumstances we are required by law to disclose the potential commission of a criminal offence by our client, such as money laundering. The circumstances in which confidentiality can be overridden are rare.

Who Has Access to Your Information?

On a day-to-day basis various Kidwells Rated Ltd staff have access to your details and therefore your information to be able to process your matter. This way your matter is dealt with more quickly and should you have a query, we are able to answer you immediately.

- Reception will take your initial enquiry with contact details.
- A member of the administration team will input your enquiry on to the system and will update information as and when required.

How and Where Files Are Stored

We only keep your personal data for as long as we need to and are legally entitled to as long as we have your permission to keep it.

- Your paperless files and information are stored on our System of which all the necessary people have access to.
- If your matter requires printing, the files are stored in our file room or, if in use, in a secure office. No members of the public have access to the areas where your file is stored and we run a 'clear desk' policy within the Company.

- Once the work we have done for you is completed we will archive your data via our Cloud system and all original paperwork is then sent for certified confidential destruction.
- After the legal requirement to keep files for six years, or more in some cases, your file, and all personal information, is deleted. Any documents that we have been asked to deposit in safe custody will be exempt from destruction.

Your Right to Complain

As a professional company we are committed to attempting to resolve problems that may arise with our services. It is therefore important that you immediately raise any concerns you may have.

What is a complaint?

The Company regards a complaint as an oral or written expression of dissatisfaction which alleges that the complainant has suffered (or may suffer) financial loss, distress, inconvenience, or other detriment.

Am I entitled to complain?

Yes, if you are unhappy about any aspect of the service, you have received or costs relating to your matter then we want to hear about it.

How do I complain?

Complaints can be raised in several ways. The Company will allow and respond to complaints made by any reasonable means giving due consideration to the individual needs of that client. Your first contact regarding a complaint should be directly to our Company Administration team. You can do this via:

Complaints
Kidwells Rated Ltd
4 Coldnose Road
Rotherwas Industrial Estate
Hereford
HR2 6JL

How will my complaint be handled and how long will it take?

When a complaint is first received, the firm must respond by letter within 5 working days of the day upon which we received the complaint. This document contains a complete copy of our Complaints Procedure which advise of the complainant's. You can request additional copies at any time. Records of all complaints and each of their associated documents and correspondence will be kept by the Company and recorded on our complaints log.

The Company will aim to resolve disputes within 8 weeks of receipt of the complaint. The Company will investigate the complaint fully. This will include reviewing the work completed.

After the matter has been investigated, the Company will if appropriate invite the complainant to a meeting to discuss and hopefully resolve their complaint.

Within 3 days of that meeting the Company will write to the complainant confirming the meeting and any solutions that were agreed at it.

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You can request additional copies at any time. Records of all complaints and each of their associated documents and correspondence will be kept by the Company and recorded on our complaints log.

The Company will aim to resolve disputes within 8 weeks of receipt of the complaint. The Company will investigate the complaint fully. This will include reviewing the work completed.

After the matter has been investigated, the Company will if appropriate invite the complainant to a meeting to discuss and hopefully resolve their complaint.

Within 3 days of that meeting the Company will write to the complainant confirming the meeting and any solutions that were agreed at it.

If the complainant does not wish to attend a meeting, the Company will send a detailed written response to the complainant with suggestions for resolving the complaint within 8 weeks of sending the letter acknowledging the complaint.

If the complainant remains unsatisfied a Director will review the decision and may arrange to meet with them to discuss why they remain unsatisfied.

Within 14 days of that review or meeting, a Director will summarise the outcome of the this will conclude the internal complaints procedure.

Staying Safe and Protecting Yourself

We cannot be held responsible for fraudulent emails. Take care when opening any email by confirming the address is correct. It is worth reading www.actionfraud.police.uk for ideas on how to stay safe online.

Kidwells have no intention of changing bank account details. If you receive an email of this nature, please contact our Accounts Department to check the legitimacy of any notification you may receive. If you are concerned about how to provide us with sensitive information or documents, please ask and we can recommend safe methods.

Equality and Diversity

This Company is committed to promoting equality and diversity; we operate an Equality & Diversity policy. The Company intends to treat everyone equally and with the same attention, courtesy, and respect regardless of their disability, gender, age, marriage or civil partner status, pregnancy and maternity, race, racial group, colour, ethnic or national origin, nationality, religion or belief or sexual orientation.

The Company will treat seriously, and will act where appropriate, all complaints of discrimination or harassment.

Anti-Corruption and Bribery Policy

It is our policy to conduct all our business in an honest and ethical manner. We have a zero tolerance approach to bribery and corruption.

Costs

All the work carried out by the business will be set out in our client care letter. We work on a Fixed Fee basis and require payment before any work is completed.

We accept payment by bank transfer, cheque or Direct Debit. Our bank details will be displayed on all invoices. If payment is made by cheque it is to be made out to Kidwells Rated Limited.

An invoice will be sent with this document the Terms of Engagement and your client care letter.

Work will not begin until payment has been received and the client care letter signed and returned to us. Once you have become our client if further work continues you will be invoiced accordingly. It is your duty to update us of any changes in contact details.

Normally rates are reviewed with effect from 1st January each year. If a review is carried out before this matter has been concluded, we will inform you of any variation in the rate before it takes effect.

Cost Complaints

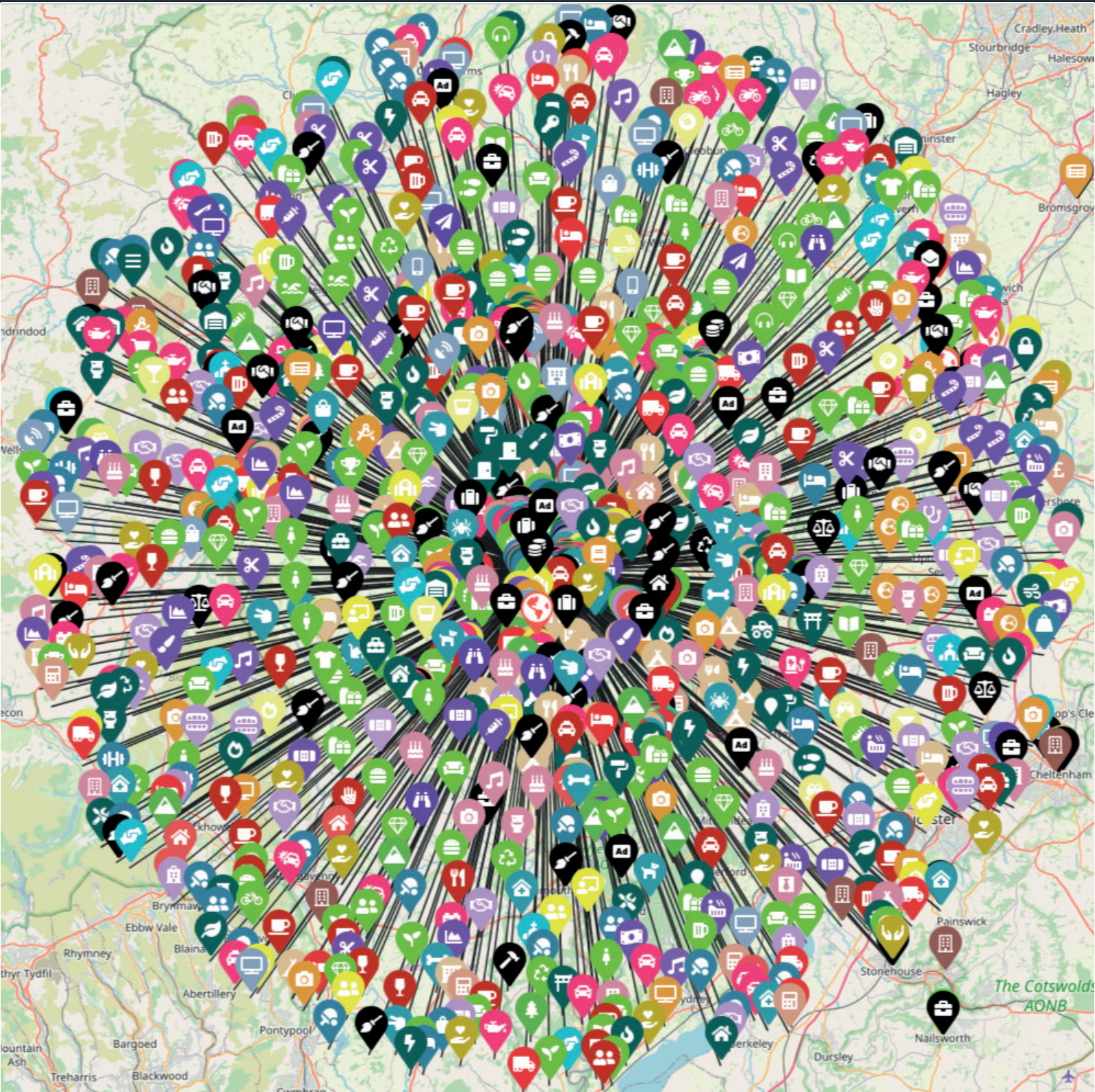
If you have any queries about your invoice, you should in the first instance discuss it immediately with us. If it is not rectified immediately, please follow our complaints procedure detailed in this document.



Call us:
01432 278179

Email us:
hello@whats-in.co.uk

www.whats-in.co.uk



What's In