

Policy for Client Appointments

The following policy and procedure is in place in accordance with Government guidelines during the Coronavirus epidemic from 1 June 2020:-

1. In accordance with my existing practice, all client appointments, whether at my office or held remotely, must be made by prior arrangement.
2. Initial meetings with new clients may be held remotely eg by Zoom, Skype or WhatsApp etc or, if none of these is viable and customer due diligence checks can nevertheless be carried out, by telephone.
3. Existing clients and new clients are given the option of a face-to-face meeting, provided that they expressly agree in writing to be bound by the terms of this policy in advance.
4. Where possible, my preference is to continue to hold all meetings with existing clients and new clients remotely eg by Zoom, Skype or WhatsApp.
5. If a new or existing client has any symptoms of Coronavirus (COVID-19), he/she must cancel any face-to-face appointment immediately.
6. All clients must attend office appointments alone, other than in exceptional circumstances and agreed in advance with me eg clients with a disability. If the client has been taken by car or other vehicle to the appointment, the driver may wait in or near his/her vehicle in the business centre car park until the appointment is over.
7. In each case the client should please make every effort to arrive as exactly as possible at his/her appointed time. If a client is a little early, he/she is asked to wait in his/her car/vehicle or at a distance of at least 2.5 metres from the office door.
8. The client is asked to bring his/her own pen, highlighters etc to the appointment; this will not be shared with me at any stage during the meeting.
9. Weather permitting, the door of the office will be left open pending the client's arrival; clients are asked not to touch the door handle at all during a visit. There should be no need for the client to touch the door or its handle. However, as a precaution, the handles on each side of the door will be cleaned with disinfectant immediately before and after each appointment.
10. On arrival, the client should announce his/her arrival at the door and put on the pair of disposable gloves which will be laid out on a small table just within the office. The table will have been wiped with a disinfectant cloth immediately before the appointment. A choice of 'medium' or 'large' sized gloves will have been made by the client prior to the appointment. The client must wear the gloves throughout the appointment.
11. If requested in advance, I will wear a face mask throughout the meeting, provided by me.

12. The client's chair, and a table or desk for his/her use during the meeting, will be positioned at approximately two metres from the office door. I will sit behind one of my two desks throughout the meeting, maintaining a distance of at least 3 metres from the client's table.

13. Once the client is seated, I will close the front door, which will remain closed throughout the meeting.

14. If the client is making a payment by card during an appointment (normally at the end of the meeting), the client may move to the appropriate desk to allow the card machine to be used. The client and I must remain at a distance of at least 2.5 metres from each other throughout this process. This will mean that the client and I will each make several 'visits' to the machine in the course of this process.

15. Regrettably, but to minimise risk, no toilet facilities will be made available to clients during face-to-face meetings at the office.

16. At the end of the meeting, the client may either remove and deposit the disposable gloves on the door mat of the office or retain them for disposal later on.

17. This policy is also applicable to appointments with third parties on all client matters eg meetings with witnesses, experts or barristers.