



## Advice Services Client Charter

### **Equity, Diversity and Inclusion**

Equity, diversity and Inclusion (EDI) are all things we hold dear, they are in our DNA. By this we mean that we subscribe to the view that we are all equal through our common humanity; we value and embrace the diversity of our clients, staff and volunteers and we work to eliminate discrimination.

Our advice is for everyone but we design our services so they are proportionate to need, even where the numbers of people affected are small. We are also here to empower our clients and we always treat clients, staff and volunteers with respect and dignity.

### **Our commitment to you:**

#### **Confidentiality**

We will provide you with a confidential advice service. This means that we will keep your information safe and we will not tell other people (even your family or friends) or other agencies about your visit or other issues. If you need us to pass on information in order to help you resolve your issue, we will get your specific consent. (There are some occasions where we may need to share data without your consent – you can read about this in our [privacy policy](#))

#### **Respect**

We will treat you fairly and respectfully. This means we will not judge you or tell you what to do, nor will we treat one person more favourably than another.

## **Quality**

Our trained advisers will give you their full attention. We will always have a team of supervisors available to oversee our work to ensure that the service you receive is accurate and high quality.

## **Time**

We give everyone as much time as they need and don't rush our work. This means you may have to wait before speaking to one of our advisers. However, once it's your turn we will give you time you need.

## **Feedback**

We encourage feedback on our service. Information about how to make a comment or complaint is available from any of our team.

## **Your right to complain**

We will deal with your complaint confidentially and quickly. You can make a complaint in the way that suits you (in person, in writing, by phone or by email).

If your complaint is about money or debt advice, and you are not satisfied with our handling of your complaint, you may then refer to the Financial Ombudsman Service.

We are authorised and regulated by the Financial Conduct Authority and our unique registration is FRN: 617718

## **What we ask of you:**

Please behave in a way, which is sensitive and respectful of the needs of other clients and our team.

## **Cancelling an appointment**

If you need to cancel an appointment that has been arranged with you, please use the number you were given to tell us that you will not be available.

## **What you can expect as a client of Citizens Advice:**

### **Access to our services**

You do not need to be referred to us, you can contact us directly. Full details of our services are published on our website.

### **Gathering information**

We collect information about you and your circumstances that are relevant to your enquiry and this information is stored in our database. You may remain anonymous if you wish. During your meetings, phone calls or emails with us we'll take notes about you and your enquiry.

### **Paperwork**

We may need to see your original documents, for example a tenancy agreement, and take copies. We will give you back all your original paperwork.

### **Conflict of interest**

Very occasionally we are asked to help people who are in dispute with each other. We will notify you if we identify a potential conflict of interest. If this situation arises, we will signpost one of the parties to another service so that both parties can be advised by separate advice agencies.

### **Delivering your advice**

At first, we will be focused on making sure that we understand how we can help you. Once we have completed this assessment, we will conduct research and provide you

with advice about your options and next steps. Occasionally the help you need will not be immediately available. If this is the case, we will explain this and arrange an email or telephone call back.

### **Client satisfaction**

We want to make sure you receive a high quality service from us and we will invite you to give us feedback. This is gathered on our behalf by a trusted third party agency employed through National Citizens Advice. Our adviser will ask for your consent on this matter.