

## Client agreement

### Citizens Advice Bath & North East Somerset will provide you with:

- **Confidential advice.** We will not tell anyone about your case and will not pass on anything from our records to anyone outside the Citizens Advice service without your permission, unless we are required to do so by law, or it is the right and necessary thing to do. Our records are subject to quality checks. We will respect your data protection rights for any information you provide to us. Please ask to see our Privacy Policy if you would like to know more.
- **Follow-up work.** Any follow up work will be agreed between your adviser and you. This may include negotiating on your behalf with other organisations by letter or phone. We will discuss any offer with you before accepting it, unless you have specifically told us what to do. We may be able to offer representation at Social Security Appeals Tribunals if the case is appropriate and we have the resources and you comply with what we expect from you (see over).
- **A complaints procedure,** if you are not satisfied with the service we have provided. If you wish to complain, please ask for the leaflet which explains how to complain.

We cannot guarantee to take on all cases, even if someone is already a client. We may also have to stop advising you if we believe we cannot make progress on your case for you or there is no further good outcome that can be gained, or if you do not do what we expect of you (see over).

### In return, we expect you:

- To keep appointments you have made with us or let us know in advance if you can't make it.
- To inform us of any changes in your circumstances which may be relevant to your case. Examples of relevant changes are change of address, birth of a child, additional income

- To bring in all the papers relevant to your case which your adviser asks for. This includes notification of court or tribunal dates etc.
- Not to take action on your case on your own behalf without discussing it first with your adviser.
- To provide written evidence of your income, debts or other financial matters where appropriate. Your adviser will let you know what is needed.
- To follow our advice – unless you and your adviser agree you should do something different.
- To be honest with us about the circumstances of your case, for instance by telling us about all your debts and income or what led up to your being asked to leave your employment.
- To always treat our staff and volunteers with dignity and respect.

We reserve the right to stop advising you if:

- you turn down a reasonable offer from the other party because you wish to take the matter to a tribunal or court hearing. Your adviser will discuss with you whether an offer is reasonable in the circumstances.
- you do not follow our expectations listed here.

*Dated: March 2024*

*Last review: March 2025*

*Next review: March 2026*