Inheritance Planning Company

Complaints Policy

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Responsible Officers: Aidan Adams and Joanna Pilcher
Policy Number: 3

Our Commitment

Inheritance Planning Company (IPC) is committed to providing a high standard of service to all our clients. If something goes wrong, or you are unhappy with the service you have received, we want to hear from you. We take all complaints seriously, will investigate them thoroughly, and aim to learn from them so that we can continually improve.

How to Make a Complaint

In the first instance, all complaints should be directed to our Complaints Manager:

Aidan Adams, Director
Email: a.adams@inheritance.uk.com
Post: 18 Walsworth Road, Hitchin, Hertfordshire, SG4 9SP

If your complaint relates specifically to Aidan Adams, please contact:

Joanna Pilcher, Director
Email: j.pilcher@inheritance.uk.com
Post: 18 Walsworth Road, Hitchin, Hertfordshire, SG4 9SP

You do not need to raise your concern with anyone else before contacting the Complaints Manager directly.

What Happens Next

Step 1 — Acknowledgement

We will aim to acknowledge receipt of your complaint within 2 working days (not to include Mondays and Fridays) and, if necessary, ask you to confirm or clarify the details in writing.

Step 2 — Recording

Your complaint will be logged in our complaints register.

Step 3 — Investigation

We will investigate your complaint promptly, fairly and free of charge.

This will normally involve the following steps:

- We may ask the member of staff involved in your matter to provide their account within two working weeks.
- We will review their response alongside the information you have provided. We may contact you if further information or clarification is needed.
- Where necessary, we will review the relevant file and any related correspondence.

Step 4 — Our Response

We aim to provide a full written response within four weeks of receiving your complaint. Our response will include:

- A summary of our findings
- Where appropriate, any proposed resolution

If we are unable to respond within four weeks, we will write to you to explain the delay and provide a revised timescale.

If You Remain Dissatisfied

If you are not satisfied with our response, you may wish to seek independent advice, for example from Citizens Advice or a consumer legal adviser. If you would like guidance on any further options available to you, please do not hesitate to contact us and we will do our best to assist.

If we do not achieve a satisfactory conclusion to your complaint within 8 weeks, you may complain to the Legal Ombudsman. In most cases, you have 6 months from our written response to refer your claim to the Legal Ombudsman. The handling of this complaint will be free of charge. The contact details for the Legal Ombudsman are as follows:

Telephone: 0300 555 0333

Email: enquiries@legalombudsman.org.uk

Address: Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ

More information can be found at www.legalombudsman.org.uk

IPC is supervised by HMRC for anti-money laundering purposes under the Money Laundering Regulations 2017. Concerns about IPC's compliance with those specific obligations may be directed to HMRC.

Confidentiality

All complaints will be handled in confidence and in accordance with our Privacy Policy.