Supporting Customers in Vulnerable Circumstances

At Dartington Wealth Management Limited, we are committed to treating all our customers fairly and providing an accessible, supportive and professional service.

We recognise that anyone can experience circumstances that make managing financial matters more difficult or mean they need additional support.

These circumstances may be temporary or permanent and can arise for many reasons, including:

- Health conditions or disabilities.
- Bereavement or significant changes in personal circumstances.
- Financial difficulties.
- Reduced confidence or experience in financial matters.
- Difficulties understanding complex information.
- Other circumstances that may affect a customer's ability to make informed financial decisions.

We understand that every customer's circumstances are different.

Our aim is to ensure that all customers have an appropriate opportunity to understand the financial advice and services we provide and to make decisions that meet their needs.

How We Can Help

Where additional support would be helpful, we will consider reasonable adjustments to the way we communicate and provide our services.

Depending on individual circumstances, these may include:

- Allowing additional time for appointments and decisions.
- Providing information in a clearer or more accessible format.
- Explaining financial matters in straightforward language.
- Arranging additional discussions where necessary.
- Supporting communication through an appropriately authorised family member, trusted person or representative.
- Taking account of individual communication preferences and accessibility requirements.

We encourage customers to tell us if there is anything we can do to make our services easier to access or understand.

You do not have to disclose detailed medical or other sensitive information unless it is relevant and necessary to the support or service being provided.

Any personal information shared with us will be handled confidentially and in accordance with our Privacy Notice.

Our Commitment

Our staff are expected to recognise when customers may require additional support and to respond with sensitivity, professionalism and respect.

We are committed to the principles of the FCA Consumer Duty and to delivering good outcomes for all our customers, including those in vulnerable circumstances.

If you require additional assistance or would like to discuss how we can support you, please contact us.

Dartington Wealth Management Limited

Telephone: 01223 211 122

Email: enquiries@dartingtonwealth.co.uk