

PEARSON MAY

CHARTERED ACCOUNTANTS & CHARTERED TAX ADVISERS
Originated 1841

www.pearsonmay.co.uk

Probate and Estate Administration Services - Regulatory and Complaints Information

How do I make a complaint?

If you would like to talk to us about how we can improve our service to you, or if you are unhappy with the service you are receiving, please let us know by contacting James Rose, the Head of Legal Practice.

The firm has more than one authorised individual to carry out probate work. We will consider carefully any complaint that you may make about our probate services as soon as we receive it and will do all we can to resolve the issue.

We will acknowledge your complaint within five business days of its receipt and endeavour to deal with it within eight weeks. Any complaint should be submitted to us by letter.

If we do not deal with it within this timescale or you are unhappy with our response you may of course take the matter up with our professional body the ICAEW and the Legal Ombudsman.

Complaints to the Legal Ombudsman should be made within six years of the act or omission or within three years of you becoming aware of the issue, and in either case within six months of our written response to your complaint to us.

The contact details for the Legal Ombudsman are:

Post: Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ
Email: enquiries@legalombudsman.org.uk
Telephone: 0300 555 0333

Is there a compensation scheme?

As we are licensed / authorised for the reserved legal activity of non-contentious probate, in the unlikely event that we cannot meet our liabilities to you, you may be able to seek a grant from ICAEW's Probate Compensation Scheme.

Generally, applications for a grant must be made to ICAEW within 12 months of the time you become aware, or reasonably ought to have been aware of the loss.

Further information about the scheme and the circumstances in which grants may be made is available on ICAEW's website at www.icaew.com/probate.

Do we hold Professional Indemnity Insurance?

We maintain professional indemnity insurance in excess of ICAEW requirements.

Our liability to you is limited to losses, damages, costs and expenses caused by our negligence or wilful default. However, to the fullest extent permitted by law, we will not be responsible for any losses, penalties, surcharges, interest or additional tax liabilities arising from delays in supplying information, failure to supply any appropriate information, the supply by you or others of incorrect or incomplete information, or your failure to act on our advice or respond promptly to communications from us or the tax or other authorities.