

Client care letter template

Fill in the square brackets. Delete what doesn't apply.

Opening

[Firm letterhead]

[Date]

[Client name and address]

Our reference: [reference]. Your matter: [short description].

Dear [client name],

Thank you for instructing us. This letter confirms what we will do, who will do it, what it is likely to cost and how to complain. Please read it with our enclosed terms of business.

Who is dealing with your matter

[Name], [role], will handle your matter day to day: [phone], [email].

[Name], [role], supervises the work and is responsible for it. If [first name] is away, [name] will help.

What we will do for you

You have asked us to [describe the work and the outcome the client wants].

We will: [list the main steps].

We will not: [anything outside this work, such as tax advice]. We will confirm any extra work and its cost in writing first.

What we need from you

Before we start, we need [proof of identity and address, where the money for the transaction comes from, and any documents listed]. [If the matter is in scope of the money laundering rules: The law requires these checks, and we cannot go ahead without them.]

Please tell us straight away if anything changes.

Our costs

We will charge [a fixed fee of £[amount] plus VAT] or [£[rate] an hour plus VAT for [name] and £[rate] for [name]].

Our best estimate of the overall cost is £[amount] plus VAT, including [disbursements such as search, court or Land Registry fees]. We will tell you promptly if it is likely to change, and why.

We will bill you [monthly, at the end, or at these stages]. We may ask for money on account before we start or before particular steps.

Money we hold for you

Any money we hold for you is kept in our client account. [Set out your policy on paying interest on client money.]

If you are unhappy with our service

If you are unhappy with our service or our bill, please tell [name and role] at [email or address]. Complaints are free, and our procedure is [enclosed or at link].

If we have not resolved your complaint within eight weeks, you may be able to ask the Legal Ombudsman to look at it: usually within one year of the problem, or of when you found out about it, and within six months of our final response. See legalombudsman.org.uk.

How we are regulated

We are authorised and regulated by the Solicitors Regulation Authority, number [SRA number]. Its rules are at sra.org.uk. [Explain which work is regulated and the protections available, such as our professional indemnity insurance and the SRA Compensation Fund.]

Your right to cancel

For consumer clients instructing away from your office or at a distance.

You can cancel this contract within 14 days of the day after it is made, without giving a reason, by telling [name] in writing.

We will not start work in those 14 days unless you ask us to. If you do and then cancel, you may have to pay for work done so far.

Your information

Our privacy notice at [link] explains how we use your personal information.

Next steps

Please sign and return the enclosed copy of this letter and our terms, with the information listed above.

Yours sincerely,

[Name], [role]

Before it goes: a checklist

- ☐ Scope says what you will and won't do.
- ☐ Basis of charging and best estimate of overall cost.
- ☐ Fee earner and supervisor named.
- ☐ Complaints contact, Legal Ombudsman and its time limits.
- ☐ SRA number and regulatory protections.
- ☐ Cancellation section for consumers instructing away from the office.
- ☐ ID and source of funds requests match the matter.
- ☐ Read by the fee earner before it goes.

