

## **Client Agreement:** **This is for you to keep**

**Welcome to Cambridge & District Citizens Advice. We can provide you with:**

- **Free advice.** There is no charge for the advice we give you or the work we do on your behalf.
- **Confidential advice.** We need to record information about you to help with your enquiry. We have a legitimate interest to do this. When we record and use your personal information we will:
  - Only access it when we have a good reason
  - Only share what is necessary and relevant with third parties to help solve your problem e.g. charitable applications
  - Not sell it to commercial organisations
  - Anonymise any data used in reports to our funders

You can request a copy of your recent records (we call this a **subject access request**) but this will need to be in writing. We have one month to respond to this.

- **Follow-up work**, as agreed between your adviser and you. If we do follow-up work, we cannot guarantee that you will always see the same adviser. This follow-up work may include **negotiating** by letter or phone on your behalf with other organisations. Unless we have specific instructions from you, we shall discuss any offer with you before accepting them. In a small number of cases, we may be able to offer **representation** for First Tier Benefit Tribunals. We will only do this if the case is appropriate, the bureau has the resources and you comply with what we expect from you.
- **Compliments and Complaints:** we welcome your feedback on the service you have received. Please ask Reception or your Adviser for a feedback form.

We **cannot guarantee** to take on all our clients' cases. We may also have to stop advising you if we consider there is little likelihood of further progress or further benefit, or if you fail to comply with what we expect of you.

We are a **local charity** so If you would like to **make a donation** towards the running of the service, that would be very much appreciated. Please use the yellow boxes in interview rooms or donate on-line via our website [www.cambridgecab.org.uk](http://www.cambridgecab.org.uk)

Please turn over .....

**In return, we expect you:**

- To **keep appointments** you have made with us (or let us know in advance if you can't attend).
- To **not to take out any new credit** or add to your existing debts once you engage in money advice with us.
- To **inform** us of **any changes in your circumstances** (such as change of address, birth of a child, additional income etc.) which may be relevant to your case.
- To **bring in all the papers** relevant to your case which your adviser asks for. This includes notification of court/tribunal dates etc.
- To **provide written evidence** of your income, debts or other financial matters where appropriate. Your adviser will let you know what is needed.
- **Not to negotiate on your own behalf** without discussing it first with your adviser.
- **Not to turn down an offer** from the other party which your adviser considers reasonable in order to have a tribunal or court hearing.
- To **follow our advice** – unless you and your adviser agree you should do something different.
- To **be honest with us** e.g. 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 volunteers and staff with courtesy and respect.**

If we are representing you and you fail to keep to these undertakings, we **may decide that we are no longer able to represent** you.

You should also remember that if a tribunal or court considers that you have pursued your case in an unreasonable way or without any real chance of success, or you have failed (without good reason) to meet its deadlines, **it can make you pay the other side's costs.**

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