



POLICY NUMBER: 1.1

POLICY TITLE:

INVOLVEMENT IN WILLS & ESTATES OF CLIENTS

WHO MUST ABIDE BY THIS POLICY?

TEMPORARY WORKERS

THE PURPOSE OF THIS POLICY:

- To provide temporary workers with the rules on accepting bequests, gifts and gratuities from clients.
- To provide a mechanism which protects the client from financial loss or harm.
- To ensure that all temporary workers act in a manner that promotes openness, honesty and integrity.

POLICY CONTENT:

WHAT YOU MUST NOT DO

Policy	<ul style="list-style-type: none"> - It is the policy of the Employment Business that temporary workers must never accept any involvement as a party to the making of the clients will or in bequeathing any part of the client’s estate. - Temporary Workers must not agree to draft the client’s will or any part thereof. - Temporary Workers must not agree to act as a witness in the will or as an executor of the client’s estate. <p><i>Please note: Involvement in a clients will as described in this policy is seen as serious and the appropriate action will be taken.</i></p>
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WHAT YOU MUST DO

Honesty	<ul style="list-style-type: none"> - All temporary workers are required to act openly, honestly, responsibly and without criminal intent in respect of a client’s will or estate.
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WHAT YOU MUST DO

<p>Assistance allowed.</p> <p>Appointment as executor.</p>	<ul style="list-style-type: none">- Temporary Workers are only allowed to assist the client:<ul style="list-style-type: none">- where the client has no family, advocate or friends that will help to assist the client and where- the assistance that the staff member is giving is to merely contact an advocate, solicitor or Citizens Bureau on the client's behalf. All staff members must report any knowledge of the client appointing them as an executor of the client's estate immediately by making a record in the client's file and advising the Registered Manager.- There will however be situations where the temporary worker has had no prior knowledge. If this should occur, then the temporary worker should advise Registered Manager immediately.
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END OF POLICY