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Supporting Vulnerable Clients

Summary:

This session will be looking at the obvious and less obvious forms of vulnerability and identifying lessons learnt from case law around wills, LPAs and gifts where advisers have failed to recognise and adapt their approach.



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Trainer & Author

Caroline is the former Chief Executive and former Chair of Solicitors for the Elderly, (now Lifetime Lawyers) an organisation she helped to found in 1999. She is well known legal trainer in her specialist field, advising older and vulnerable adults who have limited physical and/or mental capacity.

Caroline is trained to use Makaton signs and symbols for clients who struggle to use spoken language, and writes Easy Read legal information to empower those who struggle to otherwise access legal services.

Key Facts:

- > **Vulnerability refers to individuals who may be at an increased risk of harm due to factors such as disability, illness, age, or social circumstances. Legal professionals must assess and adapt their approach to meet clients' needs effectively.**
- > **Vulnerabilities can be both obvious and subtle, including literacy difficulties, social isolation, or bereavement. Failure to recognize and accommodate these factors can lead to legal challenges, particularly in wills, LPAs, and gifts.**
- > **Under the Equality Act 2010, legal professionals must make reasonable adjustments to support vulnerable clients. This includes improving communication methods, recognizing undue influence, and providing accessible materials such as Easy Read documents.**

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