

# Client Appointment Guidelines



## Our plans

With effect from 6<sup>th</sup> July and subject to any further Government guidance, we are able to offer clients face-to-face meetings in our offices.

When you are contacted to arrange your meeting, you will be offered one of the following choices:-

- 1) Video conference
- 2) Face to Face meeting in our office
- 3) Telephone if you are unable to visit us or if you don't have electronic facilities.

We know that many of you have been getting used to various video conferencing methods whether it be Microsoft Teams, Zoom, Go to Meeting and other systems and we appreciate that you may wish to continue to use this method.

### **IMPORTANT NOTE - High Risk Groups**

***If you have an underlying health condition or are one of the high risk groups, see link [here](#) . You must let us know.***

## What will happen if you choose a face-to-face meeting?

Our absolute priority is keeping you and our staff safe, so our meetings will be a little different for a while.

All face-to-face meetings will be held in one of our offices. For the time being this means that meeting in your own home or office will not be offered.

You can find out exactly what to expect if you chose to come into the office below:

### **Preparing for your arrival**

- You will be asked to confirm that you do not have any COVID 19 symptoms and that you have not been in recent close contact with anyone else displaying symptoms by completing a Health Declaration.
- We will retain a record of all who attend the meeting including RU Group staff for Track and Trace purposes as well as offering you the option of using the NHS track and trace QR Code.
- We are limiting face-to-face meetings to one client group arriving on a staggered basis at a time so no other clients will be present in our reception when you arrive and you will be shown straight to the meeting room.



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- We'll be providing hand sanitiser at our reception and in our meeting rooms and would ask that you use this on entry and exit.
- We have disposable face masks and gloves for you to use if you feel more comfortable wearing these and you forget your own.
- All internal doors will be open for you to walk through, thus minimising your need to come into contact with any unnecessary surface.
- If the weather and temperature permits we will also open up windows in the meeting room to allow a through draft of air.
- We've enhanced cleaning practices, including cleaning all meeting room surfaces, door handles and toilets etc before and after any client visits our offices.
- We have clear signage in reception, toilets and meeting rooms regarding our hygiene standards.
- A toilet will be allocated to one client appointment party at a time to prevent sharing with another party who may be in an appointment in another room.
- We are limiting the numbers of staff present in our offices to those that are essential to carry out our service to you.

### **Keeping your distance**

- Your adviser and any member of staff you come into contact with, may be wearing a face covering and will adhere to strict social distancing guidelines. Distance between yourself and your adviser will be two metres at all times. The rooms are set up to also facilitate this.
- To facilitate social distancing whilst in a meeting we have perspex screens meaning you do not need to wear a face mask if you are sat opposite the screens to your adviser. You may if you wish, do so.

### **Refreshments**

- So that we can implement social distancing safely some of our usual services won't be available. We will not be offering any refreshments, other than sealed bottled water, so you might like to bring your own drinks.

### **Meeting stationery**

- So that we can minimise the amount of paperwork exchanging between us, your adviser will share all meeting papers electronically on screen. This also allows us to engage in a more environmentally sustainable manner.
- If you are required to sign a document this will if at all possible be provided by an electronic signature.
- If we need you to bring any papers with you we'll let you know, and will ask for these to be provided electronically before the meeting.
- We will minimise where possible the sharing of any office stationery.
- If at all possible, to facilitate the points above, it would be beneficial if you could bring a device with you that you receive emails on- eg mobile phone, i-pad etc

**We look forward to welcoming you back soon and please do let us know if you have any questions.**



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