Complaints Procedure

1. Introduction

Our firm is committed to providing a high-quality, professional will-writing and estate planning service. As a full member of the Society of Trust and Estate Practitioners (STEP), we follow the STEP Code of Professional Conduct and the STEP Code for Will Preparation in England and Wales.

If you are dissatisfied with any aspect of our service, we encourage you to tell us so that we can address the issue promptly and improve our processes.

2. How to Make a Complaint

If you have a complaint, please contact us as soon as possible post or email to damian@gormanlegal.co.uk

To help us investigate efficiently, please provide:

- Your name and contact details
- A clear description of the issue
- Relevant dates, documents, or correspondence
- The outcome you are seeking

3. Acknowledgement of Your Complaint

We will:

- Acknowledge your complaint within 5 working days of receiving it
- Give an estimated timeframe for our investigation

4. Investigating the Complaint

Your complaint will be handled by Damian Gorman.

The investigation may include:

- Reviewing your file and relevant documents
- Speaking with anyone else involved in the matter

- Requesting clarification or additional information from you
- Assessing compliance with the STEP Codes and procedures

We will aim to provide a full written response within 28 days. If the matter is complex and requires more time, we will notify you and keep you informed of progress.

5. Our Response

Our written response will include:

- A summary of your complaint
- Details of our investigation
- Our findings and conclusions
- Any proposed remedies, which may include an apology, corrective action, or service improvements

If you are satisfied with the outcome, we will consider the matter resolved.

6. If You Are Not Satisfied

If you remain unhappy after receiving our final response, you have the right to escalate your complaint externally.

As a full STEP member, we are subject to the STEP Complaints and Disciplinary Process.

You may contact STEP if you believe we have breached the STEP Code for Professional Standards or Will Preparation Code for England and Wales and you have exhausted our internal process and remain dissatisfied.

STEP Contact Details:

Society of Trust and Estate Practitioners (STEP)
Website: https://www.step.org/professional-standards/making-complaint
STEP will assess whether your complaint falls within their remit and advise you of the next steps.

7. Record Keeping

We maintain a complete log of all complaints, responses, and outcomes in accordance with the STEP Codes, data protection law and our internal governance requirements. This helps us identify patterns, implement improvements, and maintain high standards.