

# Squiggle.me Ltd. Code of Practice

Squiggle's mission is to provide a fresh and modern alternative to the legal industry's traditional approach to estate planning. We focus on your problems and challenges in a transparent way, not on trying to sell you documents and then charging you for the time. For this reason, we're well on our way to becoming the UK's top Estate Planning company.

## **1. Principles of Confidentiality**

Squiggle recognises that the nature of our work gives us frequent access to proprietary information, the release of which could cause a client serious financial or other damage. Our clients have placed Squiggle in a position of trust, and we undertake not to violate that trust at all times.

Squiggle is committed to maintaining the highest degree of integrity in all our dealings with potential, current and past clients, both in terms of normal commercial confidentiality as well as the protection of all personal information received in the course of providing the business services concerned. We extend the same standards to all our customers, suppliers and associates.

We avoid any unnecessary exposure to any client confidential information that is not required for us to deliver on a specific engagement. We ensure all employees and contractors are made aware of this.

We have policies, procedures, mechanisms and software in place that recognise different levels of sensitivity of client information. We have established appropriate methods for handling this.

We recognise that certain instructions may require collaboration with other colleagues and contractors. We have in place a policy for never openly discussing an engagement, other than with colleagues who are contractually involved.

## **2. Ethics**

We always conduct our own services honestly and honourably, and we expect our clients and suppliers to do the same. Our advice, assistance and the methods imparted through our training take proper account of ethical considerations, together with the protection and enhancement of the moral position of our clients and suppliers.

We hire our team members based on strict criteria that include the highest levels of integrity and trust.

We have a transparent work culture, based on integrity and trust.

Our values are centred around client experience.

We act with integrity and do not engage in any practice that is considered or may be construed as unethical. We reject any principles of dishonesty or misleading behaviour.

## **3. Duty of Care**

Our actions and advice will always conform to relevant law. We believe that all businesses and organisations, including Squiggle, should avoid causing any adverse effect on the human rights of people in the organisations we deal with, the local and wider environments, and the well-being of society at large.

## **4. Conflict of Interest**

As soon as we discover a conflict – potential or actual – we undertake to disclose the conflict to the affected client(s) and then take action to resolve it.

We train and encourage our teams to recognise a potential conflict of interest.

We are transparent and proactive in communicating with our clients how we seek to avoid any issues of conflict of interest.

## **5. Fees**

Our fees are always competitive for what we provide, which is a high-quality, tailored document drafting service. As such, we do not generally offer arbitrary discounts. In general, a reduction in price is only enabled by reducing the level or extent of services

to be delivered. That said, we always try to propose solutions that accommodate our clients' available budgets and timescales. Wherever possible, we agree with our fees and basis of charges clearly in advance so that we and our clients can plan reliably for what lies ahead, and how it is to be achieved and financially justified.

## **6. Quality Assurance**

We maintain the highest standards of quality through ongoing reviews of our in-house processes and procedures. We encourage regular review meetings and provide regular progress reports.

## **7. Professional Conduct**

We conduct all of our activities professionally and with integrity. We take great care to be completely objective in our judgement and any recommendations that we provide so that issues are never influenced by anything other than the best and proper interests of our clients.

## **8. Equality and Discrimination**

We are a diverse organisation and our team is diverse. We are proud of our diverse client base. We are never influenced in our decisions, actions, or recommendations by issues of gender, race, creed, colour, age or personal disability and we always strive to be fair and objective in our advice and actions.

## **9. Legal Advice**

Squiggle.me is an online service providing legal documentation and information relating to estate planning. Squiggle.me is neither a law firm nor a substitute for legal advice or estate planning advice about complex estate planning issues. We reserve the right to use the services of our partner company Squiggle Consult Ltd., for complex estate planning issues, but this does not constitute legal advice.