

KEY FACTS FOR SERVICES PROVIDED

1. Standard terms of business

- 1.1 Details of the firm's professional registrations, including audit registration where applicable, can be found at www.jonesavens.co.uk
- 1.2,2.5,4.1,10.2 The firm is a member of The Institute of Chartered Accountants England and Wales and its code of ethics can be found at www.icaew.com
- 1.3 The firm's professional indemnity insurer is Zurich Insurance plc who can be located at Zurich House, Ballsbridge Park, Dublin 4, Ireland.. The territorial coverage is worldwide excluding professional business carried out from an office in the United States of America or Canada and excludes any action for a claim brought in any court in the United States of America or Canada.
- 3.1 Where the firm or its associates earn commission in respect of transactions we arrange for you, our fees otherwise payable by you will not be abated by such amounts.
- 4.2 Interest on client monies will be calculated using the prevailing rate applied by Natwest Bank plc.
- 5.5 The firm accepts settlement of fees by certain credit cards, including major UK ones.
- 9.3 The firm does not use the HMRC Agent Toolkits as outlined in paragraph 9.3, their use being voluntary.
- 10.1 The principal contact at the firm if you would like to discuss any aspect of our services is David Knight who can be contacted on 01243 789031.
- 11.1 This engagement letter is governed by and construed in accordance with English law.
- 14.3 A copy of the firm's privacy notice may be found at https://www.jonesavens.co.uk/images/GDPR_Privacy_Statement.pdf
- 14.7 The contact at the firm if you would like to contact us about any data protection issue is Richard Smith who can be contacted on 01243 789031
- 24.2 We are licensed by the ICAEW for the reserved legal activity of non-contentious probate. Details of our probate accreditation can be viewed at icaew.com/probate under reference number C001479271. The probate regulations can be viewed at icaew.com/probate.
- 24.3 To discuss any aspect of our probate service, contact the Head of Legal Practice, David Knight, who can be contacted on 01243 789031.
- 24.4 As the firm has only one authorised individual to do probate work, the alternate appointed by the firm for the continuation of probate work for our clients is available on request.

