

Covid Secure Meeting Checklist

We anticipate the resumption of face-to-face meetings from 19th July, however, to protect our clients, families and colleagues, we will only conduct such meetings in a manner which is COVID-Secure, this is irrespective of your vaccination status.

Exclusions

- We will not meet face-to-face within 10 days of you returning to the UK from abroad.
- We will not meet face-to-face within 10 days of us or you being advised to self-isolate.
- We will not meet face-to-face whilst you are suffering from any common cold etc.

Pre-meeting

- People may experience temporary or permanent vulnerability at different times in their life, particularly when dealing with their personal finances. We reiterate our [vulnerable persons policy](#) and invite all clients to have family member or friend attend their meetings with us (subject to that person following our COVID-Secure requirements).
- Please ensure your [NHS COVID-19 app](#) has been functional for two weeks prior to our meeting.
- Please conduct a rapid lateral flow test, the test kits are available for free from <https://www.gov.uk/order-coronavirus-rapid-lateral-flow-tests>. Lateral flow tests are easily administered from home and the result is available within 30 minutes. Lateral flow tests are not a reliable indicator of having COVID, but they are a good indicator of being infectious or not.
- If we are meeting in your workplace or home please ensure that the meeting room is ventilated for at least two hours before the meeting.

During the meeting

- We will not shake hands
- If we are meeting at your workplace or home, please ensure the meeting room remains ventilated throughout.
- Please wear an appropriate face covering unless [exempted](#)
- For clients with hearing disabilities, we are happy to wear transparent visors.
- We will not share pens.
- If we need you to use a stylus for a digital signature, we will sterilise it immediately before handing it to you and then immediately upon its return.

Following your meeting

- If within 7 days of your meeting please urgently let us know if you test positive, or become aware that you've been in close proximity to an infectious person, or are advised to self-isolate.

Please note:

- Our approach to your health is the same as our approach to your personal finances, we will not take unnecessary risk.
- All our client facing team have been 'double jabbed' and take regular lateral flow tests.
- Telephone and video meetings will remain available
- We expect and apologise in advance for any inconvenience caused by us having to self-isolate at short notice.