



# *Management of Financial Affairs*

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# Management of Financial Affairs

One of the many services offered by our Private Client Department is assisting clients with the management of their property and financial affairs. When someone who, for example for reasons of ill health or lack of mental capacity, is unable or no longer wishes to deal with their own financial affairs, we are able to assist. This can be crucial as there may not always be a relative or close friend who is able and willing to help.

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## How we can help

Hart Reade offers two levels of service:

- **General assistance** – this may be more suited to clients who wish to retain day to day control of their affairs but would like some assistance, for example in setting up standing orders and direct debits for the payment of bills. We can monitor their income and bank accounts to ensure that all is in order and there are sufficient funds to deal with ongoing expenditure. We can also assist in corresponding with various institutions on an “ad hoc” basis as required by the client.
- **Full management** – we can provide assistance under a Lasting Power of Attorney for Property and Financial Affairs. Alternatively, in situations where a client has lost mental capacity to deal with their affairs, we can provide assistance under the provisions of a Deputyship Order following an application to the Court of Protection.

The full management service includes the initial set up, notifying the various financial institutions that an appointment under a Lasting Power of Attorney or Deputyship Order has taken place, ensuring monies are properly invested to provide an appropriate income after seeking advice from an independent financial adviser and reviewing this on a regular basis.

Our services also include matters such as discharging liabilities and ongoing expenses relating to nursing or care home fees or for the provision of a care package where the client remains in their own home, arranging for hot meals to be delivered, discharging household bills, putting any necessary maintenance arrangements in place and, where necessary, liaising with local Social Services. In such circumstances, our aim is to provide the client with sufficient support to remain independent and in their own home for as long as possible and to keep

them regularly updated on their financial affairs. We tailor our services to suit the needs of the individual client at all times.

## Contact *Hart Reade*

We offer appointments at any of our offices in Eastbourne, Meads, Polegate or Hailsham. If you or someone you know would like to find out more about our services for the management of property and financial affairs then please contact a member of our Private Client Department and we will be pleased to provide further information.

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### ***Eastbourne***

***Address:***

104 South Street,  
Eastbourne,  
East Sussex,  
BN21 4LW

***Telephone:***

01323 727321

### ***Hailsham***

***Address:***

Old Manor House,  
Market Street,  
Hailsham,  
East Sussex, BN27  
2AE

***Telephone:***

01323 841481

### ***Polegate***

***Address:***

55 High Street,  
Polegate,  
East Sussex,  
BN26 6AL

***Telephone:***

01323 487051

### ***Meads***

***Address:***

3b Meads Street,  
Eastbourne,  
East Sussex,  
BN20 7QX

***Telephone:***

01323 407577

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This information sheet is intended to be a summary only and should not be treated as a comprehensive guide and should not be acted on without qualified legal advice. If you require further information, please do not hesitate to contact Hart Reade and we will be happy to assist.

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