



---

# CUSTOMER CHARTER

---

At Sage & Elder, we recognise the responsibility that comes with managing your move and advising on your property search.

Our Customer Charter defines the standards of service you can expect from us. It is our public commitment to integrity, transparency, and professional ethics.

It has been established to provide our clients and their families with total peace of mind. It serves as a formal promise that our interests will never conflict with yours.

You can expect a service defined by:

- **Transparency:** Total clarity on fees, relationships, and advice.
- **Protection:** Strict boundaries to ensure our role remains purely professional and your estate remains entirely your own.
- **Respect:** A patient, jargon-free approach that honours your timelines and your decisions.

This document is not just a set of internal rules; it is our blueprint for doing business the right way. We hold ourselves to these standards to ensure that your move is managed with the dignity and security you deserve.

If you have any questions about how we do business, please do not hesitate to get in touch.

hello@sageandelder.co.uk  
01225 258914

## INTEGRITY & FINANCIAL INTERESTS

- **Transparent Fees:** We will always be open and upfront about our costs. You will receive a clear breakdown of fees before any work commences, with no hidden or unexpected extra charges.
- **Anti-Money Laundering:** We operate in full compliance with HMRC's Anti-Money Laundering regulations to ensure the security and legitimacy of every transaction.
- **No Conflicts of Interest:** To maintain absolute integrity, our staff are prohibited from being beneficiaries of estates or receiving gifts in wills from clients.
- **Gift Policy:** We maintain a strict gift policy. No member of our team is permitted to accept gifts or hospitality from clients or third-party professionals exceeding a value of £100.

## IMPARTIALITY & BEST INTERESTS

- **Unbiased Advice:** We provide impartial guidance tailored to your needs. We will always encourage you to seek multiple quotes or valuations to ensure you are receiving the best possible value in the open market.
- **Declarations of Interest:** If we have any professional or personal interest in an offer; specifically from developers or associated parties; we will declare it immediately and in writing.
- **Referral Transparency:** If we recommend a third-party professional, it is because of their expertise, not because of a "kickback." Any referral arrangements will be fully disclosed

## COMMUNICATION & PRIVACY

- **Authorised Contact Only:** We respect your privacy and store your data in strict accordance with GDPR guidelines. We will only communicate with individuals for whom we have your explicit written approval (e.g., family members, solicitors, or those with Power of Attorney).
- **Proactive Updates:** While we guard your privacy, we ensure that everyone you have authorised is kept consistently up to date with clear, timely information.

## PROTECTING VULNERABLE CLIENTS

- **Duty of Care:** We take our responsibility to our clients seriously. If we have concerns regarding a client's vulnerability or their capacity to make a specific decision, we will raise this sensitively and professionally.
- **Decision Support:** We will never rush a client. We ensure that information is presented in a way that is easy to understand, allowing for informed decisions to be made at your own pace.

## ACCOUNTABILITY

**Professional Redress:** As members of The Property Ombudsman, we provide access to an independent redress scheme should our service ever fall short of your expectations. All clients will be provided with a copy of our Internal Complaints Procedure.