



Wills, Gifts and Bequests Policy

INTRODUCTION

1.1. There may be occasions where clients or relatives of clients wish to offer gifts to temporary workers. This policy outlines AA Healthcare Services Ltd's approach to actions required from temporary workers who receive offers of gifts or bequests in wills.

2. RESPONSIBILITIES

2.1. This policy forms part of the contract of employment of each employee. The policy is intended to protect temporary workers from being placed in compromising situations and is intended to protect clients from the potential of financial abuse by others.

2.2. Any breach of this policy by temporary workers may result in disciplinary action.

2.3. If any temporary worker is unclear about any part of this policy they should discuss it with the Manager.

2.4. This policy applies equally to all temporary workers and to members of their immediate family.

GIFTS

3.1. If temporary workers are ever offered gifts by clients or their relatives for the care and services provided, at all times temporary workers should very clearly and politely inform clients that their job is to care for clients and they are not able to receive gifts for services given.

3.2. There are, however, some occasions (such as Christmas, birthdays etc.) where a client may feel that a gift is appropriate as part of the caring relationship that exists between Domiciliary Carer and client.

3.3. On these occasions, the temporary worker should inform management who should make a reasoned judgement at the time.

3.4. Should a client or their relatives repeatedly offer gifts, these must be politely and firmly declined, and the Manager informed. The Manager of AA Healthcare Services Ltd is available to offer advice and support in these cases.

4. WILLS AND BEQUESTS

- 4.1. If Clients seeking will advise they should be referred to a solicitor or the Citizens' Advice Bureau.
- 4.2. The Manager may make arrangements for a solicitor to visit the Agency at the request of a client but should never recommend any solicitor in preference to another.
- 4.3. Temporary workers must not participate in drafting wills, nor should they serve as witnesses or act as executors of estates.
- 4.4. Under no circumstances should a temporary worker seek a legacy for the agency from any client who is about to make, or change, their will.
- 4.5. If a client asks a temporary worker about making a bequest to the agency, refer the client to the Manager for assistance.
- 4.6. If it becomes known that a client intends to make a personal bequest to temporary workers, or appoint them as executors, the Manager should be notified.
- 4.7. Temporary workers should state that agency policy prohibits involvement in clients' affairs, and such actions may result in disciplinary measures. They have the right to withdraw from serving as executor if they choose not to participate.
- 4.8. If a temporary worker is named to receive a sum of money or a specific item from a client's estate, they should report this to the Manager as soon as possible.
- 4.9. No temporary worker should take part in organising funeral arrangements or managing the estate prior to obtaining the necessary legal advice. This policy does not pertain to donations.

5. DONATIONS

- 5.1. This policy does not apply to donations.
- 5.2. Anyone wishing to donate to the Agency should contact the Manager, who will:
 - 5.2.1. Establish the nature of the donation.
 - 5.2.2. Coordinate the process for transferring the donation.
 - 5.2.3. Provide a receipt along with a formal letter for acknowledgment.

Reviewed and checked by : Amisha Allison

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