

CLIENT CARE POLICY

Introduction

Delivering a high-quality, trustworthy service is central to how Blanchards Inheritance operates. We believe every client, whether a local authority, legal partner, or family member deserves to be treated with dignity, respect and courtesy, particularly given the sensitive nature of tracing work following a bereavement.

We aim to provide a reliable, professional and compassionate service, adapting our approach to individual circumstances while continually looking for ways to improve.

Our client-focused approach

Our core principles are:

- To provide a high-quality, expert service. Our researchers are members of the Association of Genealogists and Researchers in Archives (APG), reflecting a commitment to professional and ethical research standards. We draw on established methods - including civil registration, electoral and census records, and international records where relevant - to deliver thorough, evidenced casework.
- To communicate professionally, promptly and courteously. Cases are handled through a single, named point of contact, ensuring consistency and responsiveness rather than being passed between unfamiliar staff.
- To promote transparency of service. We aim to communicate findings and next steps in plain, jargon-free language, with clear timescales set out from the outset of every instruction.
- To safeguard client and data privacy. We handle personal and sensitive information in accordance with UK GDPR (ICO registration number: ZA709373).
- To conduct our business responsibly and with integrity, treating all individuals fairly and with respect regardless of background or personal circumstances.

Client feedback

We welcome constructive feedback as part of our commitment to continually improving service quality. Our service is rated 4.4 stars from over 160 reviews on our Google review page, which we monitor as an ongoing indicator of client satisfaction.

How to raise a complaint

We aim to deliver every instruction with reasonable care, skill, and in line with good industry practice. Where something falls short of this, we welcome the opportunity to put it right. Our team is available Monday to Friday, 9am–5pm.

Step 1 - Direct resolution: Raise the matter with your named point of contact or Luke Jones, Director of Operations (01843 808045 / luke@blanchardsinheritance.co.uk). We will acknowledge your complaint within 2 working days (aiming for 24 hours) and respond with our findings within 10 working days. If our investigation requires longer, we will contact you to explain the expected timeframe.

Step 2 - Escalation: If your concerns are not fully resolved, the complaint is escalated to Adam Blanchard, Managing Director, who reviews independently of the original handling. We will acknowledge escalated complaints within 2 working days and respond within a further 15 working days.

Step 3 - External review: If a satisfactory outcome is still not reached, we will signpost you to an appropriate external body, such as the Ombudsman, Citizens Advice, or the Information Commissioner's Office for data-related concerns.

Equality and diversity

Blanchards is committed to fairness, equality and diversity across all interactions and service delivery. Our staff do not discriminate or harass clients or colleagues on the basis of age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, or sexual orientation.