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financial  
advice



# Safe working practices during COVID-19

# Your health and safety, along with our employees, advisers and the local community, is our highest priority.

This means we ensure that we are doing our part to stop the spread of the virus, whilst continuing to provide our usual high levels of service to you, our client.

To achieve this, we have documented our operational procedures for the advice we provide in our offices and at your home or business location.

The impact of COVID-19 has placed stringent duty of care requirements on all businesses resulting in changes to our working practices. These procedures therefore require a collaborative approach to ensuring we can provide advice safely to you.

Our challenge is balancing how we provide this advice whilst providing a safe working environment for our employees, advisers and you. It is our hope that these procedures achieve that balance.

Like all businesses, we're learning each day on how we respond and adapt to the challenges presented by COVID-19. As we progress we will enhance these procedures to ensure that current knowledge is factored in to how we provide you with advice.

Thank you for your understanding.

Kind regards

TFA Trusted Financial Advice Directors

**In the event of needing to contact us in terms of these procedures or to notify us of you or a member of your family having COVID-19 please contact your adviser directly.**

# Care considerations for our colleagues and clients

# What this means for you our client

Protecting People at High Risk (e.g. classed as vulnerable)

If an employee exhibits signs of COVID-19 for your safety, we won't allow them to visit our office or your home/office.

If you are classed as vulnerable or isolating, for your safety we won't meet you face to face

Should a face to face meeting be required please notify us if you are classed as vulnerable or isolating, and for the safety of all the visit won't go ahead. The meeting will be conducted via remote means –telephone or video

Self-isolation

TFA Colleagues who exhibit signs of COVID-19 will be asked to self-isolate for the medically prescribed time. During this time they will not meet with you or other TFA colleagues face to face.

If you or those in your household have COVID-19 symptoms, TFA colleagues won't visit you for safety reasons.

Our TFA colleagues will immediately notify us if they have COVID-19 symptoms and we will then trace and contact anyone they've been in contact with.

Should a face to face meeting be required please notify us if you or others in your household/office have COVID-19 symptoms for the safety of all concerned. The meeting will be conducted via remote means such as telephone or video

Remote Advice

Recent months have shown that collaboration between TFA and clients remotely has been highly effective.

The use of Zoom and Teams has meant that advice can continue to be given without the need to meet physically.

For the safety of all concerned we will continue with this approach to avoid having to meet in person. By doing so we can reduce the risk of transmitting/catching COVID-19 for both you and the TFA colleague.

Should a face to face meeting be required please notify us. If you or others in your household/office have COVID-19 symptoms. The meeting will be conducted via remote means, telephone or video, this is for the ongoing safety of all concerned.

## Care considerations for our colleagues and clients

## What this means for you our client

COVID-19 Symptoms after meeting you

Should a TFA colleague display signs of COVID-19 within 14 days of visiting you face to face we will determine who they have been in contact with and notify them.

If you develop COVID-19 symptoms within 14 days of meeting face to face with a TFA colleague please immediately notify them.

Face to face visit

Whenever possible meetings will be held via remote means – telephone, Zoom or Microsoft Teams. If a meeting cannot be held remotely, a meeting can be held at a TFA office (maximum of 4 people including your adviser) or at your home/office where social distancing can be followed.

TFA Office visit - for the safety of you and our TFA colleagues, prior to you visiting the office we will provide you with clear guidance on what procedures and restrictions are in place that you need to be aware of. If we are visiting your home/office please provide guidance on any procedures and restrictions that are in place

Arrival at a TFA office

The need for social distancing has been explained to all TFA colleagues. You will be greeted by your TFA host from a safe distance, with the door being opened remotely where possible. Your host will direct you to our client suite.

We will have shared with you in advance the social distancing and hygiene procedures that will need to be followed. Your co-operation with these will be required.

Social Distancing

Our TFA colleagues will respect the 2-meter rule for the benefit of you and them.

If you feel that social distancing isn't possible please let your TFA host know who will then discuss options with you.

Moving around TFA's office and your home/business

Our TFA colleague will explain any marked flows around our office and if visiting your home/office they will observe any marked flows there.

Please explain any requirements that are in place regarding movement around your home/business.

Hygiene

We have provided hand wash facilities and hand sanitiser at the entrance to our offices and in each of the meeting rooms

For your peace of mind, the TFA office's are cleaned frequently and the client suites are cleaned before and after every use.

Documentation

To reduce the chances of COVID-19 transmission please be aware that cardboard/paper can hold the virus for up to 48 hours

Please ensure that you wash your hands or use any sanitiser after handling any documents provided by your TFA Host.