

Client Care & Terms of Business

A starting client care letter and terms of business for an SRA-regulated firm.

This is a starting template only. It must be tailored to your firm and matter, and reviewed for compliance with the SRA Standards and Regulations and the SRA Transparency Rules before use. Replace every [bracketed] field.

[Firm name and letterhead]

[Client name] · [Client address] · [Date]

Dear [Client name],

Re: [Matter description]

Thank you for instructing [Firm name]. This letter, together with our enclosed Terms of Business, sets out how we will work together on your matter.

Scope of work

Describe clearly what you will and will not do.

[What we will do for you, and what is outside the scope of this retainer]

Who will do your work

[Name], [role], will have day-to-day conduct of your matter. [Name] has overall responsibility.

Our charges

Give the best information possible about likely overall cost — a fixed fee, an estimate, or hourly rates with an estimate of hours. Include VAT and disbursements.

[Basis of charges, hourly rates or fixed fee, estimate, VAT, and likely disbursements such as court or Land Registry fees]

Billing arrangements

[When and how we will bill you, payment terms, and any payments on account we require]

Regulatory information

[Firm name] is authorised and regulated by the Solicitors Regulation Authority (SRA number [number]). We are bound by the SRA Standards and Regulations, available at www.sra.org.uk.

If something goes wrong — complaints

We are committed to high-quality service. If you are unhappy about any aspect of our service, or about our bill, please contact [name/role] so we can try to resolve it. A copy of our complaints procedure is available on request.

If we are unable to resolve your complaint, you may be able to refer it to the Legal Ombudsman. The Legal Ombudsman expects complaints to be made within one year of the act or omission, or within one year of when you should reasonably have known there was cause for complaint, and

within six months of our final written response to you.

You can contact the Legal Ombudsman at: Legal Ombudsman, PO Box 6806, Wolverhampton WV1 9WJ · 0300 555 0333 · enquiries@legalombudsman.org.uk · www.legalombudsman.org.uk.

The SRA can help you if you are concerned about our behaviour. This could be for things like dishonesty, taking or losing your money, or treating you unfairly because of your age, disability or other characteristic. Visit www.sra.org.uk to report concerns.

Professional indemnity insurance

You must make details of your PII available; many firms state the insurer and territorial coverage here.

[Insurer name, address and the territorial coverage of the policy]

Data protection

[How you will use and store the client's personal data, with a link to your privacy notice]

Acceptance

Please sign and return the enclosed copy to confirm your agreement to these terms, or let us know if anything is unclear.

Yours sincerely,

[Name] · [Firm name]

Sources

- SRA Standards and Regulations (incl. Codes of Conduct): www.sra.org.uk
- SRA Transparency Rules: www.sra.org.uk
- Legal Ombudsman — signposting and scheme rules: www.legalombudsman.org.uk

Important

This resource is general information, not legal, financial or regulatory advice. It reflects our understanding of the rules at the time of writing (June 2026). Fees, thresholds, timescales and requirements change — always confirm the current position with the relevant body (the SRA, GOV.UK, HMRC, the Law Society and the Legal Ombudsman) before acting.

