

COMPLAINTS POLICY



Last updated: January 2018



Peter Hall Finance & Accounting Solutions

COMPLAINTS POLICY

What complaints we can and can't deal with;

We can only handle complaints about the work, staff and levels of service provided by Peter Hall Finance & Accounting Solutions.

We can't deal with:

1. Complaints about generic treatment from HMRC
2. Your Bank
3. Companies not under a service agreement with Peter Hall Finance & Accounting Solutions or where we did not provide the advice

How do I make a complaint?

Please call or e-mail Peter Hall Finance & Accounting Solutions. They will aim to resolve any problems immediately;

Phone: 07429 651 992

E-mail: admin@peterhallfinance.co.uk

Address: 8 Colliers Court
Tillicoultry, Clackmannanshire FK7 7DR
Scotland, UK

What information we'll need from you

We will need:

- ✓ Your full name, your company name and address
- ✓ A clear, detailed description of what your complaint is about
- ✓ How you expect your matter to be resolved
- ✓ Your email address or postal address (so we can reply)

What happens next?

When you have made your complaint, we will:

- ✓ Log your complaint and provide you with a unique complaint number
- ✓ Investigate your complaint and work with you to resolve your issue to your satisfaction and as quickly as possible



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Our complaints process has two stages

Stage 1 - Frontline Resolution

- ✓ Frontline resolution aims to quickly resolve straightforward complaints that require little or no investigation.
- ✓ We aim to do this within twenty working days and will be handled by Peter Hall.
- ✓ If for any reason we aren't able to resolve your complaint within twenty working days we will contact you to discuss the options open to you.

These may include an extension to the original timescale or, should the case be more complicated than we originally thought, we shall undertake a more detailed (Stage 2) investigation.

Stage 2 - Investigation

Stage 2 investigations deal with four types of complaint:

- ✓ Cases that have not been resolved at Stage 1
- ✓ Repeat complaints
- ✓ Cases that are complex in nature and/or where it is immediately apparent that a detailed investigation is required
- ✓ Cases where incorrect advice has been given or penalties and/or fines have been generated through no fault of your own.

We will;

- ✓ acknowledge receipt of your complaint within three working days
- ✓ where appropriate, discuss your complaint with you to understand why you remain dissatisfied and what outcome you are looking for
- ✓ provide a full response within 31 working days.

If the investigation is particularly complex and we need longer than 31 working days to resolve the problem we will agree a revised time limit with you and keep you updated on progress.

What to do if you're still not satisfied

If you have already completed all steps of our complaints policy, but still feel your issue has not been resolved, you may issue a complaint to our professional body – the Certified Public Accountants Association (CPAA). Details of this procedure can be found on the CPAA's website. Please note that the CPAA do not intervene in disputes relating to fees.



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Signed: 

Position: Principle

Date: 16th January 2018

Review Date: January 2019

