

Financial counselling Letter of engagement



The Uniting WA Financial Counselling service is free and confidential and assists consumers in financial hardship. The Counsellor will identify the options available to you in order to, as far as is possible, resolve your issues. This will include advocacy, negotiation and referral.

Uniting WA seeks to avoid any conflict of interest. We will cease to act for you if it is evident that we are already acting for another family member. In that situation we will refer you to another financial counsellor.

In providing you with the highest level of service we collect personal information from you. This is recorded on file. Secure and strict procedures are followed and all files are kept in a lockable filing cabinet. We will not share this information unless we gain your permission by the signing of an 'Authority to Act'. Any client information that is no longer required will be disposed of in accordance with legal and organisational requirements. This includes the retention of files for a period of seven years. After that time the file is shredded.

Uniting WA will disclose information if it is compelled by law to do so. For example, if our organisation is served with a Subpoena issued by a Court, or if a notice is received from Centrelink, the Australian Taxation Office or the Child Support Agency. The laws which govern these departments give them power to obtain information from persons or organisations.

In assisting you, Uniting WA cannot guarantee a specific outcome for you. Rather, we offer to work with you towards realistic and achievable goals taking into account the alternatives open to you. When the matter is resolved or assistance is no longer required the file will be closed and archived. In return, we request that you respond to our letters and/or telephone calls within a reasonable time period. If we do not hear from you within 14 days we will assume you no longer require our services and we will close your file.

Uniting WA reserves the right to cease service provision should our agency consider it has not been provided with accurate and truthful details of your circumstances; you refuse to participate fully with us, you exhibit unacceptable behaviour or we have inadequate resources to continue assistance.

Uniting WA is committed to making a positive difference in the lives of those we help. To assist us with continuous improvement, we will be carrying out a random survey of clients whose files have been closed in the previous six months. All feedback will remain confidential.

I agree to take part in the survey: Yes No

I understand this engagement letter and the terms under which Uniting WA acts on my behalf.

Signature

Signature

Print name

Print name

Date

Date

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Uniting WA respectfully acknowledges the Noongar people as the Traditional Custodians of the land on which we provide our services. We recognise their unique and spiritual connection to Country and waters. We value the oldest continuing culture in the world and pay our respects to Elders past and present.