LAW FIRM LAUNCH PROGRAMME · SET UP CLIENT ONBOARDING AND ENGAGEMENT LETTERS

Engagement-letter starter

A plain-English starting point to adapt.

01 Before you use this

This is a plain-English skeleton to help you structure your own engagement and client-care letter — it is not legal advice, and not a document to send as-is. Check every section against the current SRA Standards and Regulations, and against how your firm actually works, before you rely on it.

02 Who we are and who's acting

Name the firm, the person with day-to-day conduct of the matter, and who supervises them. Give your contact details and confirm your regulator: [Firm name] is authorised and regulated by the Solicitors Regulation Authority, SRA number [number].

03 The work we'll do for you (scope)

Set out clearly what you've agreed to do and — just as importantly — what falls outside the matter. Be specific: [describe the instructions]. If the scope changes, confirm the change in writing before you carry it out.

04 Our fees and how we charge

Explain the basis of your charge — a fixed fee of £[amount], an hourly rate of £[rate], or otherwise — and what it does and doesn't include. Set out likely disbursements (such as [search fees, court fees]), whether VAT applies, when you'll bill, and your payment terms. Where you can't give a fixed figure, give a realistic estimate and say if it's likely to change.

05 Timescales and what we need from you

Give a realistic sense of how long the matter should take, and what you need from the client to keep it moving — documents, instructions, timely responses. Note anything outside your control that could affect timing.

06 If something goes wrong (complaints)

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Tell the client how to raise a concern, who to contact first, and that you'll deal with complaints under your written procedure. Set out their right to complain to the Legal Ombudsman if they remain unhappy, the relevant time limits, and their right to report conduct concerns to the SRA.

07 Your data and confidentiality

Explain how you'll hold and use their personal data, on what lawful basis, and how long you keep files, pointing to your full privacy notice. Confirm the matter is confidential, and note the limited exceptions — such as your regulatory and anti-money-laundering obligations.

08 Agreeing to proceed

Ask the client to confirm they've read and accepted the terms by signing and returning the letter, or e-signing. Keep the signed copy on the file. Remember these are only a starting structure — check them against current SRA requirements before each use.

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