

**Ashtons**  
LEGAL

**Exceptional client service  
every time**

**A Typical Day in the Life  
of a Deputy!**



YOUR BUSINESS – YOUR LIFE – YOUR INJURY

[www.ashtonslegal.co.uk](http://www.ashtonslegal.co.uk)

1

**Adrian Mundell**  
Ashtons Legal



YOUR BUSINESS – YOUR LIFE – YOUR INJURY

[www.ashtonslegal.co.uk](http://www.ashtonslegal.co.uk)

2

[ashtonslegal.co.uk](http://ashtonslegal.co.uk)

Day to Day Tasks can be split into two areas:

- Management
- Client related work

- Staff Management e.g. reviews, training, development
- Team Financial Management e.g. billing, projections, debts
- Business Development e.g. meetings, conferences, lunches
- Risk & Compliance, Audit, Supervision Requirements e.g. file reviews, Office of the Public Guardian Audit, SRA Audits
- Projects e.g. banking options for clients.

Routine Work:

- Bank Payments – internal security requirements, Office of the Public Guardian requirements, Bank requirements
- Signing off and submission of Office of the Public Guardian Annual reports & Accounts
- Signing off terms and conditions for Case Managers, Therapists, other professionals etc.
- Approval of budgets for clients
- Review and signing off financial advice documents from IFA's
- Tax returns.

Client Meetings

- Preparation for meetings
- Travel
- Attendance at meetings
- Noting up meeting
- Follow up actions.

All clients have specific things that come up:

- Property purchase and adaptations
- Approval of level of contributions from P's new boyfriend and getting co-hab agreement
- Making a gift to family in Malawi
- Vehicle or equipment purchase.

### Other items

Litigator wants an itemised breakdown of all expenditure incurred for X over the past 5 years since we have been appointed, along with a witness statement summarising it. They need it by Monday in accordance with the Court timetable.

**Other items**

Mum has asked if we can send over £1,500 for P's birthday tomorrow, she needs to pay for the party that she booked last month.

**Other items**

Case Manager has called to say that there is a new starter on the payroll and can we sign the contract today.

**Other items**

Case Manager has just called to say that P's mum has died suddenly, and they need to get additional care in.

**Other items**

Client has just been on the phone threatening to come to the office and "harm" us if we don't send him £5k. We have already declined as he is overspending. We believe that the money may be being used for drugs.

Other items

Client's Dad has just called to say he has sacked the case manager and the care team and wants us to pay him and his wife the care costs.

Other items

Client's mum has just called. They have the costs for the "once in a lifetime" holiday that the litigator suggested and there is a discount on the costs of 20% which will only apply if booked by tonight. The costs are £50,000.

If you would like more information on any of the topics discussed, please feel free to contact me through the details below.

[Adrian.Mundell@ashtonslegal.co.uk](mailto:Adrian.Mundell@ashtonslegal.co.uk)

01842 768778

07759 841131



YOUR BUSINESS – YOUR LIFE – YOUR INJURY

[www.ashtonslegal.co.uk](http://www.ashtonslegal.co.uk)