Customer support

Aldermore
aldermore.co.uk

Please complete this form to make us aware of any additional needs your client(s) may have, so that we can provide them with the right level of support.

Case reference:	**Client name:**

What is a customer vulnerability?

A vulnerable customer is someone who, due to their personal circumstances, is especially susceptible to harm, particularly when a firm is not acting with appropriate levels of care.

How will this information be used?

We'll use the information provided to tailor our relationship with the customer, providing them with the level of service to support their needs.

Please select all that apply

Health			
Physical disability	☐	Mental health condition	☐
Short or long term illness	☐	Addiction	☐
Hearing or visual impairment	☐	Low mental capacity	☐

Life events			
Retirement	☐	Relationship breakdown	☐
Bereavement	☐	Domestic abuse (including economic control)	☐
Income shock	☐	Caring responsibilities	☐
Other circumstances - Care, asylum, human trafficking, slavery, convictions			☐

Resilience			
Inadequate or erratic income	☐	Low savings	☐
Other indebtedness	☐	Low emotional resilience	☐

Capability			
Low knowledge or confidence in managing finance	☐	Poor digital skills	☐
Poor literacy or numeracy skills	☐	Learning difficulties	☐
Poor English language	☐	No or low access to help and support	☐

Other - please provide details

What additional support does your customer need?

Vulnerable customers are more likely to have different service needs. For example, they may find some channels of communication challenging or stressful or need more time to understand information and make decisions. Let us know what else we can do to help and we'll make sure the needs of your client are met.

We will use any information you share with us to help inform how we interact with your client and this will enable us to tailor support based on their specific needs and circumstances.

By providing this information, you are confirming you have your client's consent for us to do so.

When you've completed this form please save it and upload to the application.

Aldermore