Claiming back money for general client losses

If you need this guidance in a language other than English or in alternative formats, please <u>contact us [https://www.sra.org.uk/contact-us]</u> and we will provide it for you. If you need extra help with making a claim we will work with someone who has your permission to represent you, such as a new solicitor or legal advisor, or a member of <u>Citizens Advice</u> [http://www.citizensadvice.org.uk/] or other support agency.

This page contains guidance on how to claim back money owed from general <u>client [https://www.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#client]</u> losses.

Before you start to make a claim, please read our <u>general guidance on the claims process [https://www.sra.org.uk/consumers/problems/claim-papers/]</u>

You may also find this other guidance useful:

- Eligibility and <u>claiming back money relating to conveyancing</u> <u>transactions [https://www.sra.org.uk/consumers/problems/claim-papers/conveyancing-mortage-claims/]</u>, Such as
 - a mortgage that a solicitor has not paid off
 [https://www.sra.org.uk/consumers/problems/claim-papers/conveyancing-mortage-claims/#unpaid-mortgage] where they have been given funds to do so
 - unpaid stamp duty, land tax or land registry fees
 [https://www.sra.org.uk/consumers/problems/claim-papers/conveyancing-mortage-claims/#stamp-duty-tax-registry], and
 - lost mortgage advances
 [https://www.sra.org.uk/consumers/problems/claim-papers/conveyancing-mortage-claims/#mortgage-advance]
- <u>claiming back money relating to estates of the deceased, or trust funds [https://www.sra.org.uk/consumers/problems/claim-papers/will-estate-trust-claims/]</u>.

Claiming general client money or other losses

If your claim relates to a loss that is not covered by any of the other topics in this section, the list below is a general guide to what you will need to provide as supporting evidence [https://www.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#evidence] for your claim.

What we need from you



To prove the amount you claim was paid to your legal adviser, we will need

- bank statements showing the payment of money to your legal adviser
- receipts issued by the legal adviser
- copies of any cheques paid to the legal adviser (you can get these from the bank)
- copies of bills the legal adviser may have sent to you, or details of fees agreed with the legal adviser, and
- copies of any ledger sheets—if we have closed the firm, you can obtain these from the agent we asked to close the <u>firm</u>
 [https://www.sra.org.uk/consumers/using-solicitor/legal-jargon-explained#firm]: if the agent does not have them, <u>contact us [https://www.sra.org.uk/contactus]</u>, as it is possible we are storing them.

We also need details of

- why you sent the money to the legal adviser,
- any money the legal adviser paid out, and
- any other matters the legal adviser was dealing with.