Association of Probate Researchers

Professional Standards & Ethics Code

This document outlines the Professional Standards and Ethics that we expect all Corporate and Individual members of the Association to follow at all times.

Any Corporate or Individual member found to be in breach of these rules may be excluded from the Association.

This should be read in conjunction with our Code of Conduct for Corporate members.

1. General Conduct – members will behave with the upmost integrity and sensitivity when dealing with members of the public whilst conducting probate research.
2. Members will not use any information uncovered for personal gain, and where a conflict of interest arises will disclose this.
3. Members will present all probate research in a clear and concise manner in a written report with all sources accurately listed.
4. Members will not pass off research work as their own, and give proper credit to those who supply the information.
5. Fee's and Charge's – be clear and state all charges and fees upfront and in writing to the consumer.
6. Members will allow for the beneficiary to have the right to cancel any agreement entered into within the 14 day period of signature.
7. Members will take special care when dealing with vulnerable clients, in particular regard to the Mental Capacity Act 2005 and the Equality Act 2010, when assessing whether a client has capacity to make a decision
8. Members will identify and report any members who breach this code