

Schedule 5 – Institute of Professional Willwriters

16th March 2022 to 15th March 2023

Information to be included in an ADR entity's annual activity report

(a) the number of domestic disputes the ADR entity has received;

No. enquiries received (domestic)	No. enquiries received (cross-border)	No. disputes received (domestic)	No. disputes received (cross-border)	No. disputes accepted (continued to case) (domestic)	No. disputes accepted (continued to case) (cross-border)
3	0	3	0	3	0

(b) the types of complaints to which the domestic disputes and cross-border disputes relate;

Types of disputes:

- **Clients had taken firms advice to transfer their property into a trust, but had not advised that it would subsequently be difficult to re-mortgage their property. Clients had to remove their property from the trust to complete their re-mortgage, thus negating the benefit for the service paid for.**
- **Wills had not been produced in accordance with clients wishes. Adviser had tried to 'sell up' other services**
- **Firm had lost documents placed into their care by the complainant.**

(c) a description of any systematic or significant problems that occur frequently and lead to disputes between consumers and traders of which the ADR entity has become aware due to its operations as an ADR entity;

- **None**

(d) any recommendations the ADR entity may have as to how the problems referred to in paragraph (c) could be avoided or resolved in future, in order to raise traders' standards and to facilitate the exchange of information and best practices;

- **Not applicable**

- (e) the number of disputes which the ADR entity has refused to deal with, and the percentage share of the grounds set in paragraph 13 of Schedule 3 on which the ADR entity has declined to consider such disputes;

Total no. of disputes rejected	None
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Reason	No. rejected	Percentage of rejected
a) the consumer has not attempted to contact the trader first		
b) the dispute was frivolous or vexatious		
c) the dispute had been previously considered by another ADR body or the court		
d) the value fell below the monetary value		
e) the consumer did not submit the disputes within the time period specified		
f) dealing with the dispute would have impaired the operation of the ADR body		
g) other (enquired too early, not yet complained to trader, trader not member, advice call etc...		

- (f) the percentage of alternative dispute resolution procedures which were discontinued for operational reasons and, if known, the reasons for discontinuation;

	No. discontinued	Percentage of discontinued
Discontinued for operational reasons	None	

Reasons for discontinuation:

- (g) the average time taken to resolve domestic disputes and cross-border disputes;

	Domestic	Cross-border
Average time taken to resolve disputes (from receipt of complaint)	22.3 days	
Average time taken to resolve disputes (from 'complete complaint file')	2.33 days	

Total average time taken to resolve disputes	22.3 days
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(h) the rate of compliance, if known, with the outcomes the alternative dispute resolution procedures (amongst your members, or those you provide ADR for)

- 100%

(i) This point has been removed in amendments on 1 January 2021

Please add any additional information or data you think might be useful or interesting at the bottom of this report.

Schedule 6 <<ADR BODY>> - <<Reporting period>>