

# DONATE UNCLAIMED CLIENT ACCOUNTS



Your firm's residual client balances can help Step by Step support young people like Lydia, who find themselves facing the daunting prospect of homelessness.

# LYDIA'S STORY

Lydia, who tragically lost both of her parents by age 16, was supported by Step by Step who became a lifeline during her darkest days. We supported Lydia's emotional well-being and gave her a place to call home, through our Supported Lodgings. The relationship with her host, provided emotional stability that helped Lydia process her grief.

Gradually Lydia began rebuilding her confidence and sense of purpose. With the help of her Supported Lodgings Host and Keyworker, Lydia has moved from feeling fear and uncertainty to feeling empowered and supported - a life-changing transformation.

Residual client funds can help ensure we continue to provide emotional wellness support and safe accommodation to more young people.



**"My host helped me emotionally; she was very good at understanding my feelings and talking to me about how I can process them."**

**"Life is definitely looking up and definitely I wouldn't be there without Step by Step"**

## WHAT YOUR RESIDUAL CLIENT FUNDS COULD PAY FOR...

**£500** - a rent deposit for a new home

**£9,600** - a room in supported accommodation for a year

**£17,000** - six months in a Supported Accommodation Flat

# HOW IT WORKS

We've made donating residual client balances easy with our 'How To' guide below.

## DONATING UP TO £500 OR LESS

Residual client balances of up to £500 can be donated to a charity without authorisation from the Solicitors Regulation Authority (SRA).

Where the rightful owner cannot be traced, you may donate the unclaimed funds to Step by Step provided you have compiled and prescribed the circumstance under Rule 5.1(c) of the Solicitor's Accounts Rules.

## DONATING OVER £500

For residual client balances over £500, authorisation is required from the SRA before removing the funds from the client's account.

Please complete the application form on the SRA website:

[www.sra.org.uk/solicitors/guidance/general-granting-authority-withdraw-residual-client-balances/](http://www.sra.org.uk/solicitors/guidance/general-granting-authority-withdraw-residual-client-balances/)

### **For more information contact:**

Professional Ethics, The Cube, 199 Wharfside Street, Birmingham, B1 1RN.

Tel: 0370 606 2577 or email: [professional.ethics@sra.org.uk](mailto:professional.ethics@sra.org.uk)

## INDEMNITY

Step by Step offers a full indemnity for every donation of residual client balances. We will email you to acknowledge receipt (following confirmation of SRA approval if required), and provide a signed individual indemnity letter for your records.

Please contact [fundraising@stepbystep.org.uk](mailto:fundraising@stepbystep.org.uk) to arrange a bank transfer.

## FURTHER INFORMATION

If you've got any questions about donating unclaimed client accounts, contact us:

Tel: 01252 346100 (Monday-Friday, 9am – 5pm)

Email: [fundraising@stepbystep.org.uk](mailto:fundraising@stepbystep.org.uk)

# RESIDUAL CLIENT FUNDS

## 1. Organisation and contact details

Organisation Name \_\_\_\_\_

Title \_\_\_\_\_

First Name \_\_\_\_\_ Surname \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

## 2. Your donation

Organisation name \_\_\_\_\_ would like to make  
a donation of £ \_\_\_\_\_ as funds from residual client accounts.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Please make cheques payable to Step by Step Partnership Ltd and send to:  
Step by Step Partnership Ltd, 36 Crimea Road, Aldershot, GU11 1UD.

Or to arrange a BACS transfer, please call 01252 346100.

## 3. Keep in touch

We would love to keep you updated with our news, events and young people's stories.  
We promise not to pass your details on to any third parties.

☐ Please add us to your email mailing list