Complaints Policy

Lincoln Private Investment Office ("Lincoln") is committed to maintaining high standards of integrity, transparency and accountability. While we make every effort to get things right, we recognise that we may not always achieve this.

This policy summarises how concerns and complaints can be raised, managed and resolved, and reflects our commitment to dealing with them quickly and fairly. A copy of our full policy is available on request.

How to Make a Complaint

A complaint can be made in writing, by email or by telephone, or raised directly with your Adviser or to our Chief Operating Officer, Becky Robbins. Becky's details are below:

Post: Lincoln Private Investment Office, 32 Grosvenor Gardens, London, SW1W 0DH
Telephone: 0203 909 7505
Email: becky.robbins@lpio.co.uk

What Happens After You Complain

Your complaint is recorded, capturing relevant details including your contact details, the date, the nature of the complaint and all parties involved. We will acknowledge receipt promptly and confirm that the matter is being reviewed.

The complaint will be assessed by our Chief Operating Officer (COO) who will decide the appropriate course of action. We seek to resolve the complaint in a fair and proportionate manner. We aim to reach a resolution as quickly as possible and wherever possible, we will resolve the complaint within three business days of receipt and provide a written summary of the resolution.

If a complaint cannot be resolved within three business days, we will confirm this to you and advise that we will be investigating the matter and keep you updated on its progress. We will aim to provide a final response within eight weeks.

A final response will be provided to you, and the complaint is considered closed once the outcome has been communicated and, where applicable, accepted, or where no further response is received from you after our final reply.

If we are unable to provide a final response within eight weeks, we will explain the reasons for the delay, indicate when we expect to respond, and, where applicable, set out your right to refer the matter to the Financial Ombudsman Service.

Communication

We are committed to clear and transparent communication at every stage. This means acknowledging receipt of a complaint, providing updates on progress where appropriate, communicating the outcome and confirming when the matter has been resolved. Where a matter is not accepted as a complaint, we will explain why.

What if I am not satisfied?

If you qualify as an eligible complainant and you are unsatisfied with our response, you are entitled to escalate your complaint to the Financial Ombudsman Service (FOS). Please note that you must do this within 6 months of the date you receive our final response. You can reach the FOS using the details below:

Email: complaint.info@financial-ombudsman.org.uk
Post: The Financial Ombudsman Service: Exchange Tower, London, E14 9SR
Website: www.financial-ombudsman.org.uk
Phone: 0800 023 4567