Osprey Approach: Employment Settlement Agreements Employee

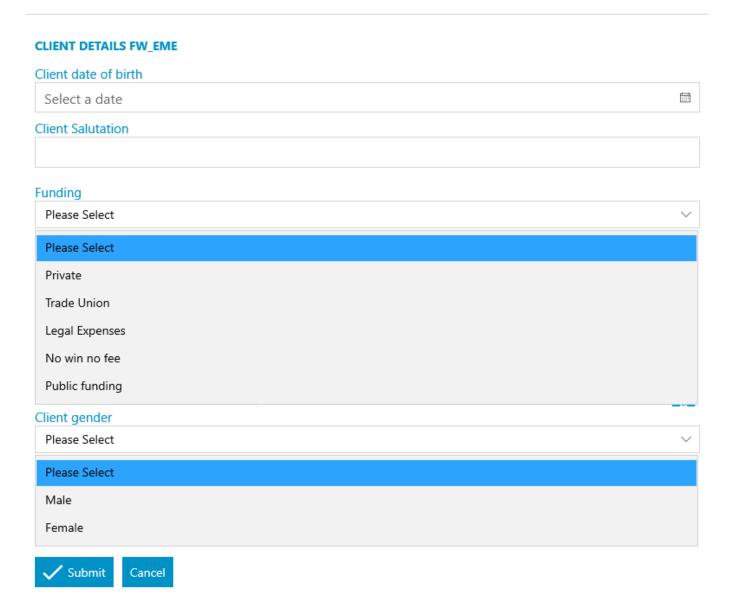
This help guide was last updated on Mar 23rd, 2023

The latest version is always online at https://support.ospreyapproach.com/?p=23042

Click here for a printer-friendly version

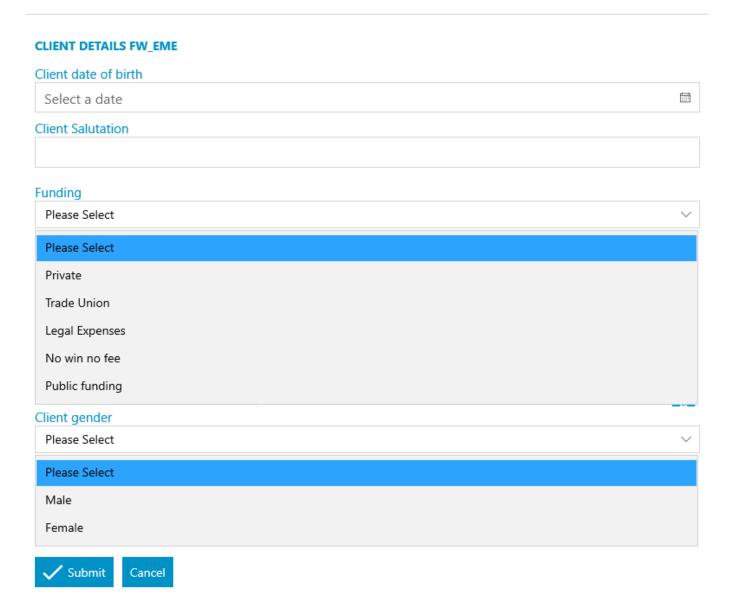


SETTLEMENT - FIRST APPOINTMENT Contribution from Employer? Please Select Please Select Yes, full Yes, partial Nο Not applicable Contribution from Employer (amount) 0.00 Contribution from Client? Please Select Please Select Yes, full Yes, partial Νo Not applicable Settlement Agreement received? Please Select Please Select Yes Νo **Employment Start Date** Select a date **Employment Termination Date** Select a date ✓ Submit Cancel



EMPLOYER DETAILS FW_EME	
Employer Company Name	
Current Recipient	
Please Select	~
Please Select	
Dear Sirs	
Employer Contact 1	
Employer Contact 2	
Employer Contact 3	
Employer Contact 4	
Employer Contact 1 Title	
Employer Contact 1 Initials	
Employer Contact 1 Forename	
For all and Company of the Company o	
Employer Contact 1 Surname	
Employer Contact 1 Email	
Employer Contact 1 Tel	
Employer Contact 1 at Main Address?	
Please Select	~
Please Select	
Yes	
No	
Not applicable	
Employer Contact 1 Address	
Employer Contact 1 Address	

SETTLEMENT - FIRST APPOINTMENT Contribution from Employer? Please Select Please Select Yes, full Yes, partial Nο Not applicable Contribution from Employer (amount) 0.00 Contribution from Client? Please Select Please Select Yes, full Yes, partial Νo Not applicable Settlement Agreement received? Please Select Please Select Yes Νo **Employment Start Date** Select a date **Employment Termination Date** Select a date ✓ Submit Cancel



EMPLOYER DETAILS FW_EME	
Employer Company Name	
Current Recipient	
Please Select	~
Please Select	
Dear Sirs	
Employer Contact 1	
Employer Contact 2	
Employer Contact 3	
Employer Contact 4	
Employer Contact 1 Title	
Employer Contact 1 Initials	
Employer Contact 1 Forename	
For all and Company of the Company o	
Employer Contact 1 Surname	
Employer Contact 1 Email	
Employer Contact 1 Tel	
Employer Contact 1 at Main Address?	
Please Select	~
Please Select	
Yes	
No	
Not applicable	
Employer Contact 1 Address	
Employer Contact 1 Address	

EMPLOYMENT DATES FW_EME	
Employment Start Date	
Select a date	
Employment Termination Date	
Select a date	
Date of Dismissal	
Select a date	
Years with Employer	
Date from which Time Limit Runs	
Select a date	
Limitation Date	
Select a date	:::1
Date last paid	
Select a date	
Notice Period (Contract)	
Notice Period (Actual)	
Total Carlos & Island	
✓ Submit Cancel	

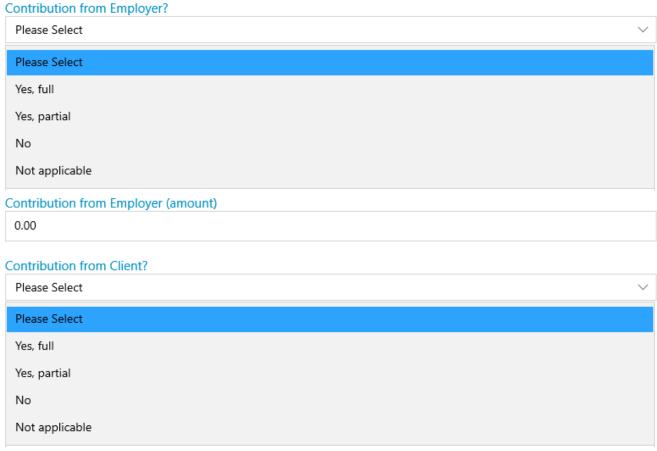
0.00

EMPLOYMENT FINANCIAL DETAILS FW_EME	
Gross Salary (annual)	
0.00	×
Grass Salany (monthly)	
Gross Salary (monthly) 0.00	
0.00	
Gross Salary (weekly)	
0.00	
Net Salary (annual)	
0.00	
Net Salary (monthly)	
0.00	
Net Salary (weekly)	
0.00	
Payment Period	
Please Select	~
Please Select	
Weekly	
Monthly	
Other	
London Weighting?	
Please Select	~
Please Select	
Yes	
No	
Not applicable	
London Weighting Amount	
0.00	
Bonus?	
Please Select	~
Please Select	
Yes	
No	
Bonus Amount	

EMPLOYER DETAILS FW_EME	
Employer Company Name	
Current Recipient	
Please Select	~
Please Select	
Dear Sirs	
Employer Contact 1	
Employer Contact 2	
Employer Contact 3	
Employer Contact 4	
Employer Contact 1 Title	
Employer Contact 1 Initials	
Employer Contact 1 Forename	
For all and Company of the Company o	
Employer Contact 1 Surname	
Employer Contact 1 Email	
Employer Contact 1 Tel	
Employer Contact 1 at Main Address?	
Please Select	~
Please Select	
Yes	
No	
Not applicable	
Employer Contact 1 Address	
Employer Contact 1 Address	

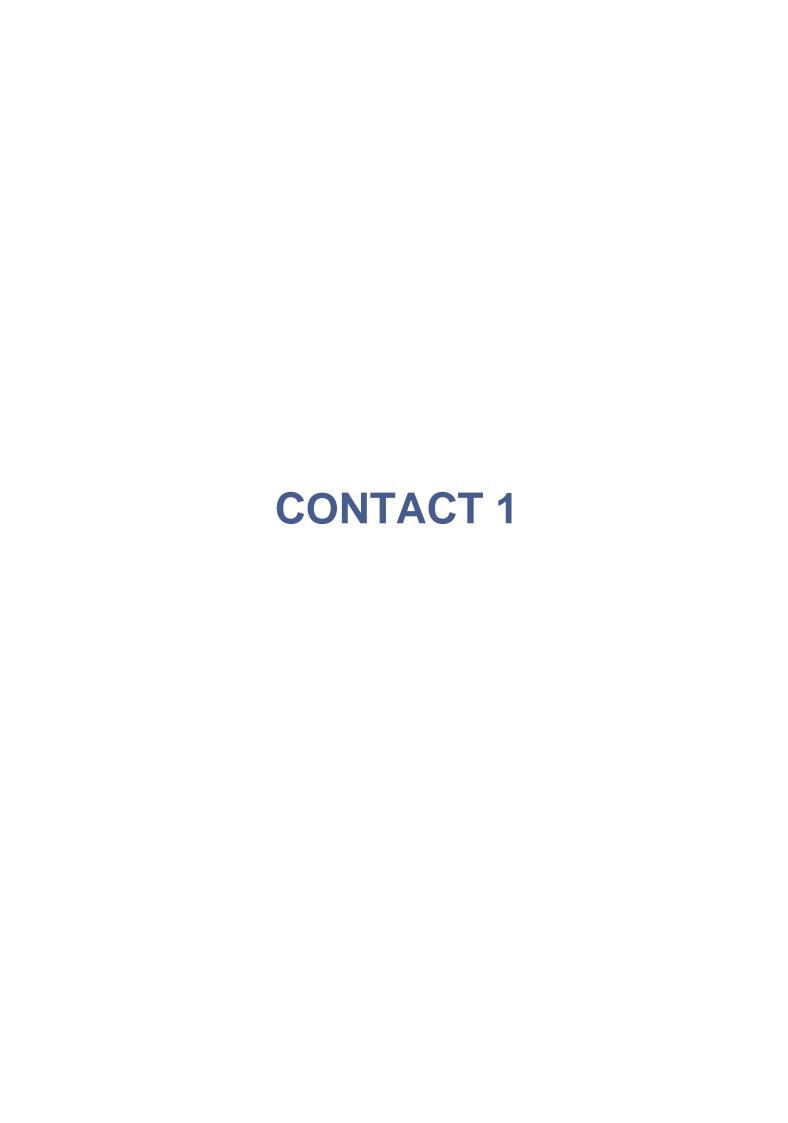
SETTLEMENT - EMPLOYER CONTRIBUTION

✓ Submit





SETTLEMEN	I AGRE	EEMENI	_





T: 0330 060 4940

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_TTL } { MERGEFIELD FW_EMPCONT_1_FW_EMP_CONT1_IN } { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_SN }

Dear { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_TTL } { MERGEFIELD
FW EMPCONT 1 FW EMPCONT1 SN }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

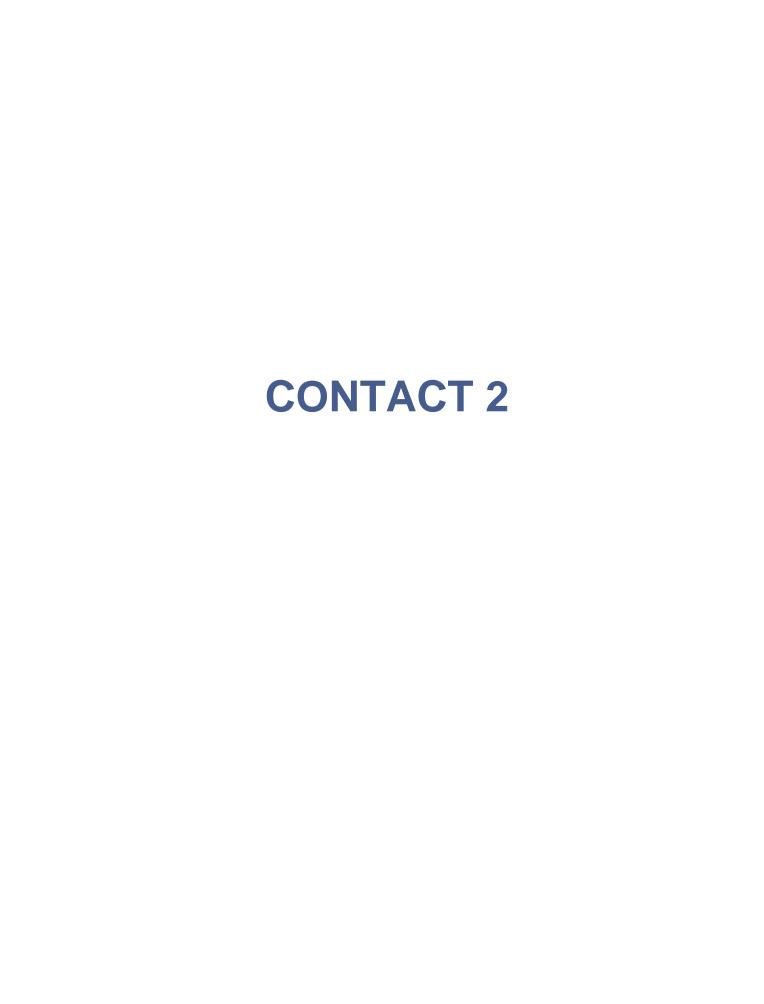
Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely



SETTLEMEN	I AGRE	EEMENI	_





i

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_TTL } { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_IN } { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_SN } { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_ADD }

Dear { MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_TTL } { MERGEFIELD
FW_EMPCONT_1_FW_EMPCONT2_SN }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely



SETTLEMEN	I AGRE	EEMENI	_

CONTACT 3



Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_TTL } { MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_IN } { MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_SN } { MERGEFIELD FW EMPCONT 2 FW EMPCONT3 ADD }

Dear { MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_TTL } { MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_SN }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

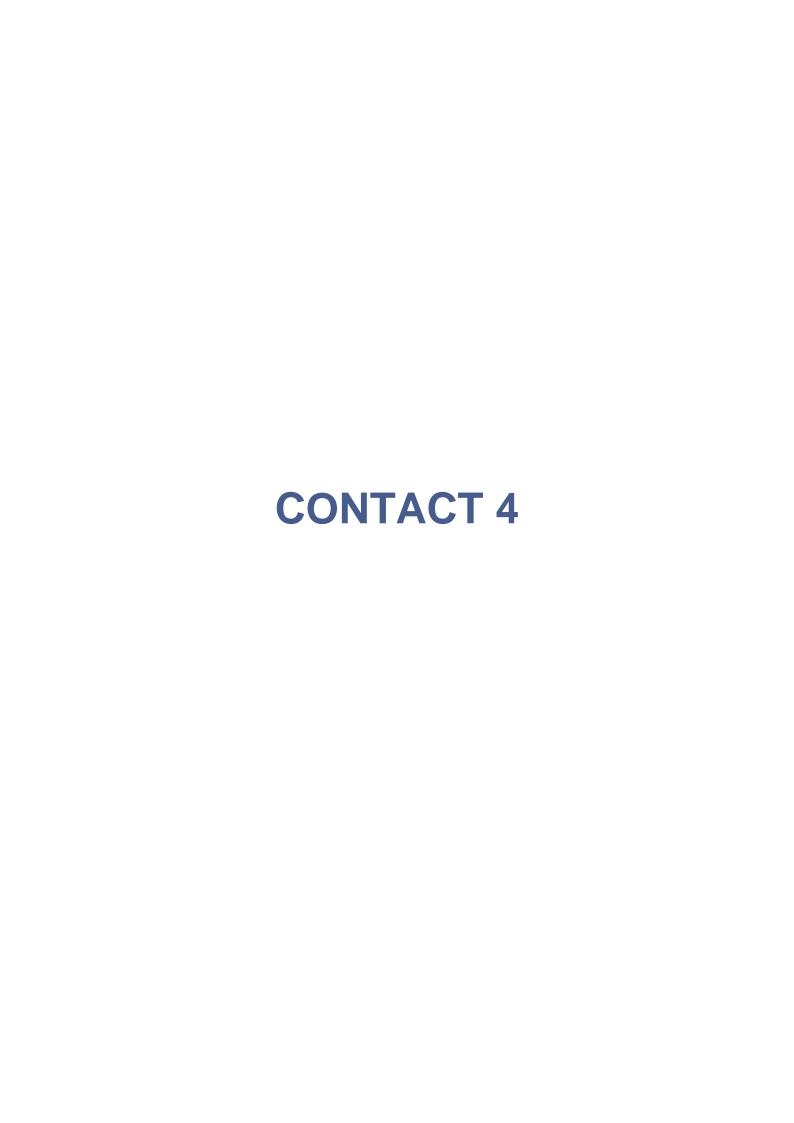
Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely



SETTLEMEN	I AGRE	EEMENI	_





Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD FW_EMP_WITDET_2_FWWIT4TITLE } { MERGEFIELD FW_EMP_WITDET_2_FWWIT4INTS } { MERGEFIELD FW_EMP_WITDET_2_FWWIT4SURNAME } { MERGEFIELD FW EMP WITDET 2 FWWIT4ADDRESS }

Dear { MERGEFIELD FW_EMP_WITDET_2_FWWIT4TITLE } { MERGEFIELD
FW_EMP_WITDET_2_FWWIT4SURNAME }

Re: { MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely



SETTLEMEN	I AGRE	EEMENI	_





Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE $\@$ "d MMMM yyyy" } }{ref LETTER $\@$ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM } { MERGEFIELD FW EMPLOYER FW EMPR MN ADR }

Dear Sirs

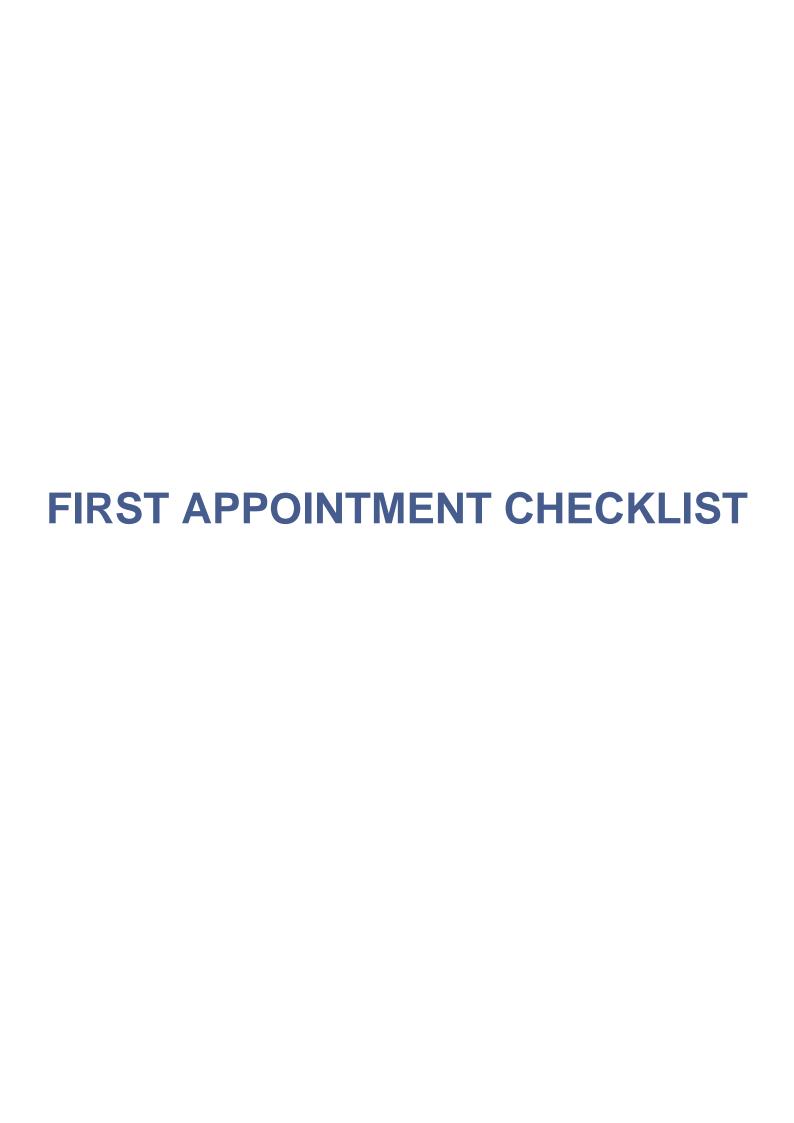
Re: { MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours faithfully

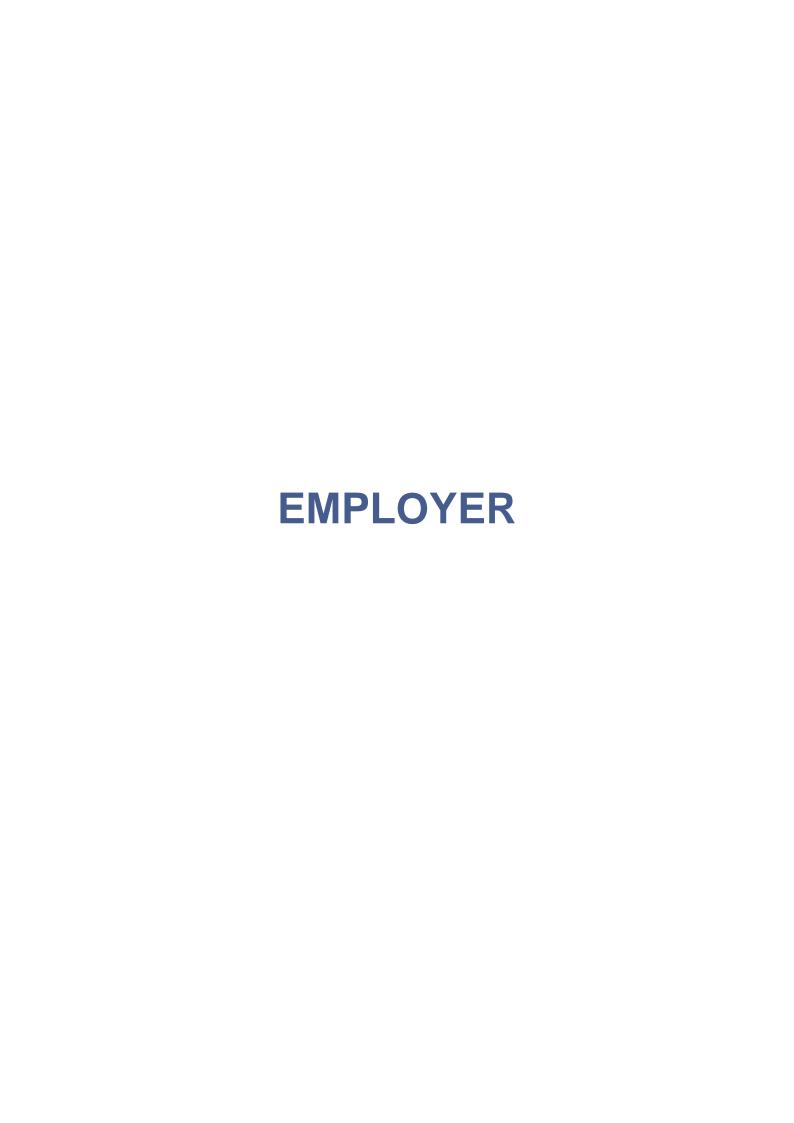


FIRST APPOINTMENT CHECKLIST

Date Client Called: { ASK Date "Date Client Called?"		Details taken by: { ASK Details "Client Details						
\d " " }{ ref Date * MERGEFORMAT }			Taken By?" \d " " }{ ref Details *					
				MERGEFORMAT }				
Full Name:	{ MERGEFIE	LD LINKNAV	IE_FC	RENAM	/IE_1 }	{ MERGEFIELD L	INKNAME_S	JRNAME_1
Address:	{ MERGEFIE	LD CALCULA	NOITA	_ADDR	ESS }			
Telephone F	Home: { MERGI	EFIELD			Work:			
CALCULATI	ON_PHONE }							
Mobile: { ME	RGEFIELD CA	ALCULATION_	_MOB	ILE }	Email	: { MERGEFIELD		
					MATT	ER_EMAIL_ADD	RESS }	
Date of	{ MERGEFIE		CLL	20P 1		ct Check :	YES/NO	
Birth:	FW_CLI_IINF	FO_EME_FW_	_CLI_I		hour:	ously had free ½	YES/NO	
Employer:	{ MERGEFIE	LD FW_EMP	LOYE	R_FW_	EMPR_	_CO_NM }		
Address:	{ MERGEFIE	LD FW_EMP	LOYE	R_FW_	EMPR_	_MN_ADR }		
Start Date: {	MERGEFIELD)			Last	day of Employmer	t: { MERGEFI	ELD
FW_EMP_TRMS_DTS_FW_EMP_START_DT } FW_EMP_TRMS_DTS_FW_EMP_TERM_DT }				ERM_DT }				
Brief Details	{ MERGEFIE	LD MATTER	_MAT	TER_DE	SCRIF	PTION }		
of Matter:								
ORIGIN OF	CLIENT: existing	ng/recommen	ded/C	AB/Inter	net/Ye	llow Pages/Lloyd	Green- News	Quest/Other
APPOINTM	ENT DETAILS:							
Date: { ASK	Appdate "Clier	nt	Time	: { ASK	Apptim	ne "Client Appointi	ment Time?" \	d " " }{ ref
Appointmen	t Date?" \d " " }	{ ref	Appt	ime * N	ИERGE	FORMAT }		
Appdate * I	MERGEFORM/	AT }						
Free ½ Hou	r/Private Client/	LSC	(If ap	р ехсее	eds 30 i	mins charge £100	+ VAT & then	hourly rate)
(Senior)	(4 yrs +)	(3-4 yrs)		(1-2 yr	s)	Newly	(Trainee)	Paralegals
						qualified		
A de de de la Co	ata a ta a U I	(-1)	· · ·	11	11		Para an	. 1
	ring in all docui orrespondence		_	tne ma	itter e.g	j. contract, wage s	iips, company	nandbook,
	vided: 1 phot	o ID & 1 addr	ess ID			3 months old)		
	If no photo ID then two address IDs.							



AGREEMENT SENT TO





www.demoospreyapproach.com enquiries@pracctice.com Suite 1, Falstaff House Malvern WR14 1JJ T: 0330 060 4940

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client no }/{ MERGEFIELD matter no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } { MERGEFIELD CALCULATION_ADDRESS }

Dear { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

Re: Settlement Agreement with { MERGEFIELD FW EMPLOYER FW EMPR CO NM }

I refer to our recent meeting when we went through the Settlement Agreement. I understand you requested voluntary redundancy, and on that basis I believe the settlement that you have received is fair and in accordance with or excess of your normal statutory entitlement.

You confirmed your understanding of the Agreement and that the compensation payment being paid to you was in full and final settlement of all claims you might otherwise have been able to argue against your employers relating to the termination of your employment.

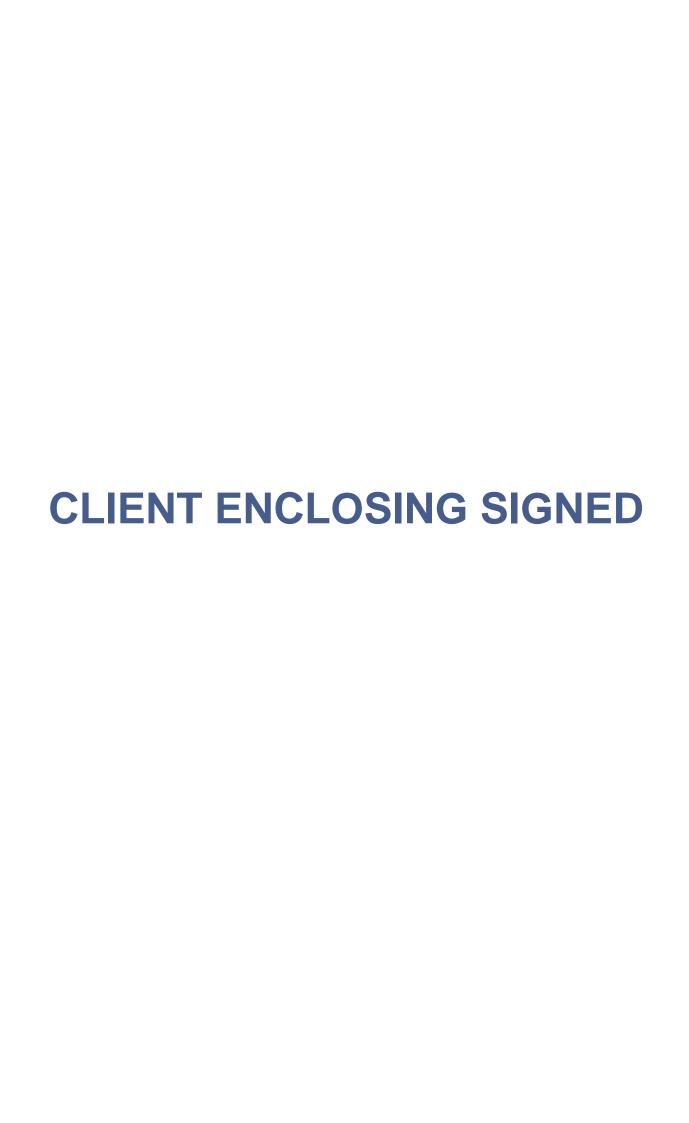
I confirm that I have sent two original signed copies of the Agreement to your employers and I will forward one original version of the Agreement for your records once received. I have also sent your employers my invoice and once that is settled this matter will be at an end.

Once my invoice is settled I will take steps to close your file of papers. Please note that your file will be kept in our archives for a period of 6 years should you need to refer to them in the future. [In the meantime I return the papers you kindly supplied to me.]

I wish you all the best with your job search and if I or anyone in the firm can be of any further assistance to you in the future please do not hesitate to contact us.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION } { MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }







www.demoospreyapproach.com enquiries@pracctice.com Suite 1, Falstaff House Malvern WR14 1JJ T: 0330 060 4940

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client no }/{ MERGEFIELD matter no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } {
MERGEFIELD LINKNAME_SURNAME_1 }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

Re: Settlement Agreement with { MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM }

For your records, please find enclosed an original signed copy of the Settlement Agreement entered into with your former employer.

Once **you and** your employer **has/have** settled my invoice(s) I will arrange to close your file. Please note that your file will be kept in our archives for a period of 6 years in case reference is required to it in the future.

In order for us to keep improving our services, we should be grateful if you could complete the enclosed Client Satisfaction Survey and return it to us with your comments.

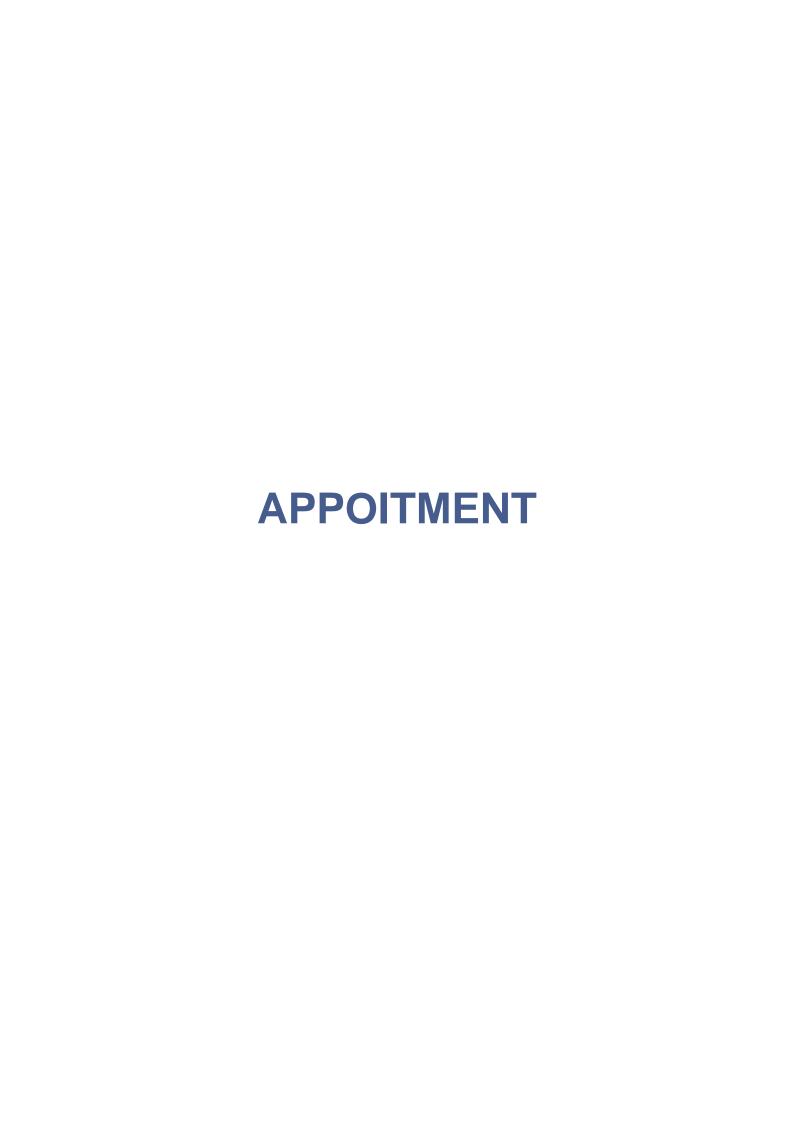
If I can be of any further assistance in the future please do not hesitate to contact me.

Thank you for your kind instructions in this matter.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION } { MERGEFIELD PRACTICEINFO PRACTICE NAME*UPPER }







www.demoospreyapproach.com enquiries@pracctice.com Suite 1, Falstaff House Malvern WR14 1JJ T: 0330 060 4940

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD

client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT }

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } {
MERGEFIELD LINKNAME_SURNAME_1 }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Further to our earlier telephone conversation I write to confirm your appointment at { ASK Apptime "Client Appointment Time?" \d " " }{ ref Apptime } on { ASK Appdate "Client Appointment Date?" \d " " }{ ref Appdate }.

You are entitled to a free 30 minute consultation, if the appointment exceeds the initial 30 minutes there is a fixed charge of £100 plus VAT for a further 30 minutes instruction and beyond this the Solicitor fee applies. If you think you have legal expenses cover on your insurance policy, please bring proof of this with you.

Please bring with you one form of photo ID and one form of address ID that is no older than 3 months and any documents you have relating to your matter.

If you require any further instruction on how to reach us or any further information before your appointment please do not hesitate to contact us.

If you have any problems attending your appointment please inform us as soon as you can.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION } { MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }





ſ

Fees

www.demoospreyapproach.com enquiries@pracctice.com Suite 1, Falstaff House Malvern WR14 1JJ T: 0330 060 4940

1

Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no } Your Ref: { SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT } { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME SURNAME 1 } { MERGEFIELD CALCULATION_ADDRESS } Dear { MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_SURNAME_1 } Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION } Thank you for instructing this firm to handle your above matter. I will do my best to ensure everything proceeds as quickly as possible. Responsibility for the work 1 ſ I will ensure that I explain the issues raised in your matter and keep you informed of the progress. I will advise you whether the likely outcome of the case will justify the likely charges and expenses and the risks involved, from time to time where necessary. Work to be carried out for you I will advise and assist you with your employment matter against { MERGEFIELD FW EMPLOYER FW EMPR CO NM } with a view to negotiate settlement by sending an open letter along with a without prejudice letter and discussing any responses with you. Legal Expenses

My fees are calculated by reference to the time spent by me and other solicitors dealing with this matter. All time spent on your file is recorded at a rate per hour. This includes advising, attending on you and others, dealing with papers, correspondence, telephone calls, travelling and waiting time.

Tribunal Fees

Please note that as of 29th July 2013 you are likely to have to pay fees in the Employment Tribunal. You will be provided with details where necessary.

Estimate

At the current stage we are unable to provide you with an estimate. As explained during our appointment this will depend on how your employer reacts to this.

Money Laundering

From 15th December 2007, solicitors have been obliged by HM Treasury to carry out a complex and risk-assessed search against every new client for transactions to protect against fraudulent activity and money laundering.

Orders for costs

At the conclusion of this matter, and in the event that you are successful, it may be that you will be entitled to the payment of your costs by some other party. However, it is rare for the system of "taxation of costs" as it is known, to result in the other party having to pay the full costs you have incurred. Further it is rare for employment tribunals to make orders for costs save in exceptional circumstances. You should be aware that you are primarily responsible for the payment of our fees.

Professional Indemnity

We can confirm that our practice currently has professional indemnity insurance in place.

Telephones

Please note that all of our calls are recorded for training and quality purposes.

Terms of Business

If there is anything that is not clear, please let me know as soon as possible.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION } { MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }