

Topic: Unmeritorious claims from beneficiaries

Steps in dealing with unmeritorious claims

- **The 6 Golden Rules**

1. Look at the Trust deed
2. Do your own reconnaissance
3. Process
 - Get beneficiaries to put their claims in writing
 - Letters of response - end up with last word
 - Narrow the dispute down
4. Mediation - get beneficiaries to the table
5. After mediation: Challenging the beneficiaries - Letter
6. Meet face-to-face
 - Take the lead
 - Beneficiaries feel like they had their day

- **The goal**

- Make the beneficiaries “focus” on their claims and work out which are the bad ones and which are the good ones.
- Making the beneficiaries think very long and very hard before they bring claims.