Using our Will Service

You complete our Will Questionnaire and/or LPA Questionnaires with your Financial Adviser

Your Financial Adviser sends the completed forms via the secure area on our website

We contact you to arrange a suitable time for one of our Will Advisers to call you

The Will adviser calls you at the agreed time to discuss your circumstances based on the questionnaire and offer any advice

Draft Will sent to you for approval with summary of advice given

Hard copies sent to you for signing

You return the signed Wills for checking and placing in secure storage. Storage reference numbers are then issued to you

Tips

Tip
The forms are designed to give us a basis for our conversation. They are not formal

Tip
Supporting documents that can be provided include;

- Leaflet - Why make a Will?
- Leaflet - Why an LPA?
- Leaflet - Guide to making a Will
- Fact sheet- Dying without a Will
- Fact sheet - Who has Parental responsibility

Tip
Don't worry about agreeing everything in the first call. You can speak with your Will adviser again. We don't charge charge for extra calls

Tip
You can make changes to the draft Wills if you wish. Nothing is set in stone until the hard copies are sent for signing

Additional info

Additional Info
Your Financial Adviser will provide you with copies of our Terms of Engagement which include details of our fees

Additional Info
We will keep your Financial Adviser informed of the progress of your Wills. If you prefer us not to do this then please initial the box in the declaration at the back of our questionnaires

Additional Info
We will inform you of any additional costs if further planning is required

Additional Info
We will invoice you for our services when the draft Wills are sent. The invoice must be paid before we issue the hard copies for signing

VERSION:OCT 2015