

Our Will and LPA Service for SJP Partners

Tips

Tip

The forms can be used to create financial services opportunities, gain new clients and facilitate planning discussions e.g. IHT, Care Fees and Critical Illness.

Tip

Login to the secure area on our website, www.pavilionrow.com, to access all our documents and leaflets.

Tip

Forms can be completed on your iPad or PC. See 'How to use our forms.pdf.'

Tip

Scribble as much information as you want on the forms. They are designed to give us a basis for our conversation. They are not formal.

Tip

Offering to be one of the witnesses for your client's Will gives opportunity to meet with them again and possibly meet other witnesses.

Please visit our website for LPA questionnaires and other documents.

SJP documents relating to SJP Will Writing Service can be found on the SJP intranet.

Complete the Will Questionnaire and/or LPA Questionnaires with the client.

Supporting Documents;

- Will Questionnaire
- LPA P&F Questionnaire
- LPA H&W Questionnaire

Send the completed forms with Client ID via the secure area on our website or email wills@pavilionrow.com

Pavilion Row contacts the client to discuss the completed form and provide advice.

Summary of advice and draft Will (if applicable) sent to the client for review.

Final copies sent to the client for signing.

Documents checked and placed in our secure off-site storage.

Additional info

Additional Info

You can contact us at any stage if you have questions, wills@pavilionrow.com or 01904 234 840/0345 634 4185

Additional Info

We pay you a fee for completing the forms on our behalf. Alternatively this can be waived providing a discount to the client.

Additional Info

Subject to client approval we will keep you updated of progress at each stage.

Additional Info

Client will be invoiced at this stage and will be informed that you are to be paid for completing the form/s or if you have chosen to waive the fee a discount will be provided.

If doing LPAs the documents will be checked once signed and registration arranged on clients behalf.