pavilionrow

Using our Will and LPA Service

Tips

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

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?

Go to **www.pavilionrow.com/about** to find details about our advisers qualifications and experience.

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

You can make changes to the draft Wills* if you wish, nothing is set in stone until the final copies are sent for signing.

* Note for LPA - we send an advice letter but to prevent potential missuse we do not send draft documents.

You complete our Will Questionnaire and/or LPA Questionnaires with your Financial Adviser (or you can complete it yourself and send directly to us).

Your Financial Adviser can send the completed questionnaires using the secure area on our website, email or post. You have a right to choose which of these methods is used.

We contact you to arrange a suitable time for one of our advisers to call you.

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

Your adviser will prepare and send to you, a draft Will* and letter of advice, within 10 working days from receipt of all required information.

Final copies are sent to you for signing within 7 working days after you have approved the document and payment has been made.

You return the signed documents to us and they will be checked and placed in our secure storage facility. Storage reference numbers are then issued to you within 10 working days of us receiving the documents.

Additional info

Please complete the section on the questionnaire declaration if you are happy for your financial adviser to be kept informed of progress.

We will send you our terms of engagement at this stage. You must confirm acceptance before the call can take place.

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

A second adviser will check the documents before they are sent to you for review.

We will invoice you for our services after the draft Wills* and advice letter are sent. The invoice must be paid before we issue the final copies for signing.

If doing LPAs the documents will be checked once signed and registration arranged on your behalf (if applicable). The court currently takes about 8 weeks to return the registered documents. We then place the registered documents in storage.