

## First Meeting / Telephone Call to client

Client is telephoned by a Will Instruction Taker/Instructor takes the instructions face to face.

Whilst on the phone/in front of the client you must inform them of the process of producing a Will and also, the Terms of Business and options available to them.

### **Right to Cancel**

Once they decide to purchase, you will need to discuss with them their cancellation rights namely the three options open to them below. (Option (c) below is optional in that you don't have to offer this).

'You have a right to cancel the order provided you do so in writing, including electronic mail, to reach us within 14 calendar days of receipt of payment.' You should also make them aware that you will e-mail them separately informing them of where they need to send a notice of intention to cancel, be this by e-mail or by post.

#### **a) Work to start straight away**

Instruct us to proceed immediately in which case you would not be able to cancel this agreement if we have started work. This does not affect your statutory right to cancel however, you may be required to pay for goods or services supplied, if the performance of the contract had begun with your written agreement, before the end of the cancellation period.

#### **b) Wait for the 'Cooling Off Period'**

Take no action for 14 calendar days after receipt of payment, the Terms of Business and the Right to Cancel Forms, provided to you by us. We would then proceed to prepare your Will(s) and you would no longer be able to cancel the contract.

#### **c) Wait for Terms of Business and then instruct us to proceed**

This option will require either e-mailed/posted confirmation from yourself. Before we are able to finalise your Will

You should understand that, if you elect to wait until the statutory 14 days have elapsed and you were not to survive this period, then there would be no recourse for any claim to be made against (your Company name) by your estate/survivors/intended Beneficiaries, as a result of your having chosen this option.

### **Take instructions from the client**

You should now know whether the client wishes to take option (a), (b) or (c) (if you offer this) above and have now informed them of the Terms of Business, the process etc. and so you should proceed to take instructions from the client either directly into the software or on paper, over the phone or face to face and once you have taken payment.

### **Take payment**

You should take payment from the client using your own payment system and this should be done at the same time as instructions are taken as this will start the contract for the 14 days.

## Online Will Writing Software

In association with **Countrywide Tax & Trust Corporation Ltd**

### Confirming the Summary - Back at the office

- **Sending the Summary**
- **Awaiting a response**
- **Making corrections where necessary**
- **Finalising the Will**

### Finalising

Finalising the Will is a 2 part process, the first of which involves sending an Order Summary and Terms of Business with the second part being the completion of the documents.

### Sending the Summary

Once you have added the instructions into the Software, you should ensure that an Order Summary is sent to the client for checking before finalising the Will, to ensure that there are no errors and therefore, no unnecessary charges.

A blue button with rounded corners and a subtle gradient, containing the text 'Send Adviser Summary' in white.

You will see the button 'Send Adviser Summary' and we would recommend that you always use this one and so once you click it, you should do the following:

1. Check the instructions and spellings are correct.
2. Forward (or print and send) the Summary to the clients attaching (or enclosing) an invoice/receipt (if necessary) and your Terms of Business which will confirm the option they have elected for, be it (a) or (b) on previous page.

You **should not finalise the Will at this point** as this will use up a Will life and not allow you to edit the Will in the case of a correction being needed.

Once the clients have come back to you, they will either confirm that everything is correct and ask you to proceed, or they will have corrections for you to complete.

Should they have corrections, you will need to ensure that you update the information and ideally, re-send the summary as per the steps above, you will be able to access the Wills by clicking 'Edit This Will' or 'Finalise The Will', each will take you to the same place and allow you to edit.

### Finalising - Back at the office

- **Download the Will or;**
- **E-mail the Will.**
- **Print and package everything ready for the second meeting.**
- **Arrange the second meeting with clients for signing (Witnesses will be needed).**

Once the client(s) has confirmed that they are happy with the details, you can then proceed to finalise everything, printing and packaging the documents and associated supplementary material such as the Important Notes on signing your Will, Role of a Guardian and Executor Sales Aids.

**Continued on next page...**

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By clicking the 'Finalise' button, you will use a Will Life and be able to produce the Will in multiple different ways.

**Download Will**

Will allow you to download the Will in PDF format, from here you can print, save or e-mail it.

**Email to Client**

This will attach the Will to an e-mail and automatically send it, along with any other material that you can request we import to your account, such as the Important Notes on signing your Will, Role of a Guardian and Executor Sales Aids.

**Email to Adviser**

Same process as above, only it will go to the Adviser (yours, if you added it)

You should note that the e-mail options will not appear if you have not added an e-mail address in the respective parts of the Software.

### **Second Meeting - Signing the printed documents - Gaining referrals**

Take the packaged documents to the clients home (if you are printing and attending the signing) with them and get the documents signed, you will have already asked them prior to the meeting that they need 2 Witnesses, each of which have not been mentioned and are independent from the Will itself.

To register please visit [www.willmakerdirect.co.uk](http://www.willmakerdirect.co.uk)



For Enquiries & Software Support please contact the Software Helpline on **01926 514 397** or email [enquiries@willmakerdirect.co.uk](mailto:enquiries@willmakerdirect.co.uk)