

Willmaker Telephone Script for contacting Executors

Hello (Mr / Mrs Name of Executor)

This is XXXXX and I am calling from XXXXXXXXXXXXX Company Ltd.

We have recently taken instruction from (Client(s) Name) to draft their last Will and Testament. In the Will you have been appointed as the Executor(s) of the Will.

In order to complete our contract with (Client(s) Name) It is essential that you are aware of what these duties will entail for you and with this in mind, I would like to speak to you to ensure that you have a full understanding of your duties and responsibilities.

Many people appoint trusted friends and relatives to be the Executors of their Will, often without even consulting the person(s) involved and without having given much thought to what is actually involved in the role. We want to ensure that you have been informed of your appointment and are happy to take on this responsibility.

In addition to the immediate tasks you might be required to attend to, such as arranging the funeral, there is often a lot of paperwork to be dealt with and official documents which need to be completed over the first few weeks following a death.

In your capacity as an Executor you will have no discretion over how the estate is administered and are legally obliged to act in accordance with the terms of the Will.

You could find yourself administering the estate over a long period of time and you will also need to arrange for the care of any minor children and pets, and arrange adequate insurance required for the Deceased's assets, such as an their property.

The Role of an Executor carries some legal liability. For example, payment of all taxes becomes your personal liability and you may also have to make tough decisions in order to comply with the wishes of the Deceased which may cause you to become unpopular with the Beneficiaries.

You should also ensure that (Client(s) Name) notify you immediately of where their original Will(s) is/are stored and that you will be able to access the Will(s) as and when required.

I am certain that you understand the importance of having a valid and up to date Will in place but can I just ask...

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"Can I ask, do you already have a Will in place?"

YES

"That's great, you are one of the few people I have spoken to today, who has actually got around to doing this. So well done."

"You obviously understand the importance of having a Will in place. Many people write their Will and then **FORGET TO UPDATE IT** when their circumstances change. For instance when they Marry / Divorce / have or adopt children, have grandchildren or even fall out with family members."

"Can I ask whether **YOUR CIRCUMSTANCES HAVE CHANGED** since you last wrote or reviewed your current Will?"

YES

NO - End Call

"You should consider updating your Will. The **SIMPLEST** and **CHEAPEST** way of doing this would be to create a new Will. This will **ENSURE** that it **ACCURATELY** reflects your new circumstances."

"Making a Will is not something you should put off doing or **YOU RUN THE RISK OF LEAVING IT UNTIL IT'S TOO LATE!**"

"It **DOES NOT HAVE TO BE** an expensive and complicated process or involve taking time out to visit a Solicitor."

Rather than leave things to chance would it not be better to **TAKE ACTION** and set up your Will today? Or, we can arrange to take your Will instruction(s) over the phone **AT A TIME CONVENIENT TO YOU.**

"The process will take only a few minutes and for a cost of just £XXXX. You will have then have **COMPLETE PEACE OF MIND** that your wishes will be met after you are gone and be sure that those you want to benefit will actually do so."

NO

"Can I ask you why you have never got round to making a Will?"

"Did you know that by **NOT** making a Will your loved ones /those you would want to inherit will **NOT** necessarily receive **ALL** of what you intended them to."

"Did you know that without a valid Will in place 'common law' partners may not receive **ANYTHING?**"

"Are you aware that if you **DO NOT** have a Will and have young children (including any that you are the Legal Guardian of) dependants or even pets, that without a Will they could be taken into care until the courts decide what should happen?"

"Did you also know that not having a Will in place could mean **lengthy delays** for your Beneficiaries, increased costs and even **disputes** between your relatives?"