

## Willmaker Telephone Script for contacting Guardians

Hello ( Mr / Mrs Name of Guardian)

This is XXXXX and I am calling from XXXXXXXXXXXX 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 Legal Guardian of any children who survive the death of the parents.

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.

Are you OK to talk to me for a few minutes about what being a Legal Guardian entails?

Being appointed as a Guardian to someone's children should not be underestimated. This is an extremely important task where you will actually be required to **take on the role of parent** to these minor children. Your being appointed as a Guardian ensures that (Client(s) Name) **avoid their children being taken into care** at what will already be a traumatic time for them.

It will be your responsibility to ensure that they are properly supervised throughout their lives until they reach adulthood.

There will be financial, social and emotional implications when taking on such a vast role. Many parents will have ensured that **financial support is in place for their children** in the event of their death, this can be a major factor when deciding to take on the role of a Guardian and you should discuss this with (Client(s) Name). You may however be able to claim child benefit and receive a Guardian's allowance in the event that both parents are Deceased.

One of the duties of being a Legal Guardian is to ensure that should you not survive these minor children reaching maturity, that financial provision has been made for them and for someone to replace you, and so, **Guardians should make a Will themselves to further safeguard the future of these children.**

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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, but did you realise that you being appointed as a Guardian means that **YOU SHOULD CONSIDER UPDATING YOUR CURRENT WILL** to reflect these changes?"

"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."

"Becoming a **LEGAL GUARDIAN** is such a change in your circumstances."

"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?"

"OK that's fine but you should really now consider making a Will to reflect your new role as a Guardian **and safeguard the children.**

"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 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 and common law partners may not receive **ANYTHING?**"

"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?"