

## Will Script continued

Once the client has confirmed that they want to proceed with having their Will instruction(s) taken, a date and time should be agreed for this to be done and it should be stated who needs to be present ie if the instruction is for Mirror Wills (a couple) then they would both need to be there at the time the instruction is taken over the phone.

Good Morning/Afternoon. I am calling in response to your request made through XXXXXXXX for a new Will.

This Will Writing service is provided by XXXXXXXXX and you are speaking to XXXXXXXXX and I will be taking you through your Will instruction(s) over the telephone, which will take approximately 15minutes.

Firstly, I need to **confirm with you that the cost for preparing your Will(s) will be £ XX.XX plus VAT making a total of £XX.XX**

Payment is made by Credit or Debit Card and will be required at the end of the call once we have taken your Will instruction. A VAT receipt will be sent to you with your Will(s).

Before we can proceed **I need to inform you of your Rights for Cancellation”.**

You can cancel this agreement provided you do so **in writing, including electronic mail** and this is received **within 14 calendar days** of your receiving our Terms of Business which will be emailed to you today, following payment.

You can either:

- 1. Instruct us to proceed immediately, in which case you would not be able to cancel this agreement if we had started work;** (The client confirms during the call that they wish to proceed immediately and without prior sight of the Terms of Business).
- 2. Await these Terms of Business and then instruct us to proceed;** (We will send out the Terms of Business today and you should respond to this email advising that you wish to proceed).
- 3. Await these Terms of Business, and if you then took no action for 14 working days after receipt, we would proceed to prepare your will(s) and you would no longer be able to cancel the contract.** (We will send the Terms of Business today and if no cancellation is received within 14 calendar days then the documents will be prepared and you will not be able to cancel payment).

**I will also need you to confirm the following please.** Please indicate the client's answers with a Yes or No.

	You	Your Partner
You are over 18?	<input type="text"/>	<input type="text"/>
That you understand the nature of and reasons for making a Will?	<input type="text"/>	<input type="text"/>
That you are a resident in the UK?	<input type="text"/>	<input type="text"/>

## Online Will Writing Software

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

I am now going to take your detailed instruction. (or If applicable)

As you require Mirror Wills I will need to speak to both you and your spouse / partner in order to proceed.

Proceed to take the Client's Will Instruction.

Thank you - that concludes your Will instruction, before we can begin to draft your Will(s) we need to process payment.

Would you please confirm that you are the card holder. I will now take your card details:

At the start of this call you agreed to: (repeat back to them whichever option they decided on from the options below)

- 1. Await our Terms of Business and then instruct us to proceed - these will be emailed to you immediately at the end of this call. Please reply to this email in order that we may proceed with the drafting of your Will(s)**
- 2. Instructed us to proceed immediately, in which case you would not be able to cancel this agreement if we had started work. Our Terms of business will be emailed to you at the end of the call.**
- 3. Await our Terms of Business, and if you then took no action for 14 calendar days after receipt we would proceed to prepare your will(s) and you would no longer be able to cancel the contract- these will be emailed you immediately at the end of this call.**

Your Will(s) will be sent to you (by email/first class mail/special delivery) today.

Please take the time to check and read through your new Will(s) carefully and follow the enclosed instructions for signing your Will(s).

Should you have any queries regarding your Will(s) please do not hesitate to contact us by email initially.

I hope that you have been happy with the service provided to you today. We pride ourselves on being able to help people achieve their aims after they have gone by establishing their Wills. With that in mind I would be grateful if you would give me the names of people who might also benefit from our help.

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)