

## **Work included in a Standard Will**

Making an appointment, receiving the Initial Instruction form at least one day in advance of the initial appointment. Attending our office for one meeting, unaccompanied (or at your house an extra cost as you are unable to come to our office). Fully completed instructions on our Initial Instruction form completed in advance by you. Supplying you with our Client Care information (in most cases by email) and an acknowledgement of instructions letter.

Preparing a draft Will leaving everything to a spouse/partner primary and then to children equally and sending a draft to you within approximately 21 days (unless supplied at the meeting), receiving details of any corrections by ordinary post and sending a further or subsequent draft/s within a further approx. 21 days. Once the draft is approved, preparing the copy/ies for signature and sending to you, with instructions for execution/retaining pending your attendance at our office to execute (at additional cost). Receiving from you an executed photocopy and scanning same into our computer system.

**The agreed fee does not include the following and will result in costs above the estimate:**

Late or non-delivery of the initial information requested and/or it is typed up by us. We charge a nominal £25.00 + VAT (It is for you to ensure that your computer system can receive and sending the necessary information and that you subscribe to an appropriate computer help system (e.g BT IT Support).

Delays at the meeting as the full information about persons referred to in the Will is not available. If the initial instructions taken review a problem that prevents a Will or LPA being prepared and you have advice or discussions with us as a result.

Any urgency or deadlines or requests to meet your timescales, and involvement of third parties either at the initial meeting or subsequently.

Any extra persons present at the whole or any part of the meeting. (£100 + VAT or as part of a time basis).

An exclusion - where it is proposed that a close member of the family (spouse, partner or child) are treated differently to others of a similar class.

Attendance on you to act as a witness to the execution of your wills (£75 + VAT)

If assets are over £300,000 and/or show there may be inheritance tax issues. Gifts of Specific items or bank accounts or other financial instruments.

Issues relating to testamentary capacity. Any issues arising from assets owned outside of England and Wales.

An extra attendance as Proof of identity/address is not available.

Time at the meeting in excess of two hours. After two hours, the meeting proceeds at our hourly rate. The agreed fee envisages a meeting of 1 hour 30 min with an extra half hour for any additional issues of exclusions/second families/testamentary capacity/inheritance tax severance LPAs etc.. This will be invoiced prior to execution of the will unless it is agreed it will be built into the retainer.