



Lasting Power of Attorney Information Pack

This document includes the following information

- Appointment Letter
- LPA Information Form
- FAQs
- Map



PRIVATE AND CONFIDENTIAL
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX
XXXXXXXXXX

Date:

Dear

Your Appointment - Lasting Powers of Attorney:

Thank you for booking an appointment with us at our office at 27 Gun Tower Mews, Rochester, Kent ME1 3GU.

A Lasting Power of Attorney (LPA) is a legal document that lets you (the 'Donor') appoint one or more people (known as 'Attorneys') to help you make decisions or to make decisions on your behalf, when you do not have capacity to do so. There are two types of LPAs Property and Financial affairs and Health and Welfare.

You have contacted us as you realise the importance of expert advice. LPAs are important legal documents, which can be quite complex and sometimes subject to abuse. As we specialise in estate planning, we will work with you to put your wishes into effect.

Our costs for preparing LPA documents are £170 for the first LPA and £120 for the second (+VAT) on a retained basis (non-retained clients are charged £225 for the first and £195 for the second (+VAT)). The work included for these costs are set out below. Please note that additional work outside of what is included will be on a time basis, so it is important that you are aware of what is and is not included.

The fees are also based upon the information in our initial information instruction form being supplied to us typed (preferably by email) at least the two days before the appointment, so we can prepare for your requirements efficiently. If you have not had an email or text to acknowledge receipt, please contact us at least the day before the appointment.

If you are over 75 or are housebound and are unable to obtain computer assistance, please contact the office and we shall at our discretion, waive this.

Please accept this as acknowledgement of receipt of £30.00 (Inc. VAT) of your non-refundable deposit to secure the appointment and for the pack.

We hope that the enclosed information is of interest and look forward to seeing you.

Graham Colley LLB MBA Dip PFS Solicitor 27 Gun Tower Mews Rochester Kent ME1 3GU

Tel: 01634 838656 Fax: 0845 280 7537 Mobile: 07785 311342

Email: solicitor@grahamcolleysolicitor.com Web: www.Grahamcolley-solicitor.co.uk Practice No. 402332.

Authorised and regulated by the Solicitors' Regulation Authority. This practice does not maintain a client account

Best wishes

Graham Colley

Please remember:

1. **to send in advance a fully completed typed Instruction form** (preferably by email so we can cut and paste limiting data input errors) at least 48 hours before the appointment.
2. **to have at the appointment:** Proof of identity and address (A passport and/or driving licence and an up to date utility bill for each client if more than one).
3. **to have at the appointment:** Your cheque book or debit card for the balance of the fees.
4. **to have at the appointment:** Your address book, full details of your assets such as details of life policies, savings, investments and other assets. Details of any houses/land you may own including Land Registry Numbers and any details of any mortgages.
5. Please bring with you: a mobile phone to dial 01634 838656 should you have any problems finding our office.

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work included in preparing Lasting Powers of Attorney:

Making an appointment, receiving the Instruction form from you at least one day in advance of the initial appointment, attending your office, unaccompanied (or at your house at an extra cost if you unable to come to our office) Confirming you have fully completed the instructions on our Instruction form, supplying you with the Client Care information (in most cases by email) and an acknowledgement of instruction letter. Preparing a draft and sending it to you within approximately 21 days (unless supplied at the meeting), receiving details of any corrections by ordinary post and sending a further draft within a further approx. 21 days.

Once the draft LPA(s) is/are approved, preparing the copies for signature and sending it to you, with instructions for execution/retaining pending your attendance at our office to execute. Receiving from you an executed photocopy and scanning it into our computer system

The agreed fee remains the same (and is not refundable) notwithstanding any changes in your personal circumstances or requirements.

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

Any additional work not included in the agreed fee or any additional meeting(s) in my capacity as a solicitor and in those circumstances the fees are chargeable at our normal hourly rates.

Late or non-delivery of the initial information requested and/or it is typed up by us £25.00 + VAT (it is for you to ensure that your computer system is capable of receiving 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 LPA is not available. New information introduced after the first draft or not supplied in writing prior to the first draft. If the initial instructions taken review a problem that prevents a LPA being prepared and you have advice or discussions with us as a result.

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

Any work in respect of registration at the Public Guardians Office. (Please note we recommend early registration)

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) is not include as an attorney and a letter of consent is not available at the initial meeting.

Calls and communications received and made outside of our core office hours (10.30am - 4.00pm Monday- Wednesday). Please use 01634 838656 and not any yellow pages number which goes to an answering service. The office is closed to calls and appointments on Thursdays and Fridays. Advising on or in response to a telephone call from you. Calls to mobile phones (please leave a landline number on which we can contact you).

Additional work arising if LPA's have been incorrectly executed or errors are found after the approval form has been signed

The fee does not include work in relation to registration of LPAs at The Public Guardians Office.

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LASTING POWERS OF ATTORNEY INFORMATION FORM

Please supply the following information preferably typed and emailed to the following address solicitor@GrahamColleySolicitor.com at least 2 days/48 hours before the meeting.

Please complete all relevant sections

Appointment Date and Time

Date : _____ Time : _____

Client 1

Title : _____ Full name: _____

Date of Birth : _____ Date of marriage / *Commencement of cohabitation* : _____

Address : _____

Email: _____

Phone Number : _____ Mobile: _____

Client 2 (if Applicable)

Title : _____ Full name: _____

Date of Birth : _____ Date of marriage / *Commencement of cohabitation* : _____

Address : _____

Email: _____

Phone Number : _____ Mobile: _____

Attorneys

Attorneys are one or more people you can appoint to help you make decisions or to make decisions on your behalf.

Attorney 1

Attorney 2

Full name : _____

Full name : _____

Address : _____

Address : _____

City : _____

City : _____

Post Code : _____

Post Code : _____

Phone Number : _____

Phone Mobile: _____

DOB : _____

DOB : _____

Relationship : _____

Relationship : _____

Persons to be told when the LPA is registered

The people named below do not need to do anything. They will just be informed when an application is made to register your LPA(s) and will have the opportunity to respond if they think that your Attorneys are acting unlawfully.

Notificant 1

Notificant 2

Full name : _____

Full name : _____

Address : _____

Address : _____

City : _____

City : _____

Post Code : _____

Post Code : _____

Certificate provider

You will need to have a certificate provider who is willing to sign to confirm that they believe that you understand the powers you are giving your Attorneys. This can be a friend or neighbour but NOT a relative an attorney or anyone related to an attorney **you must have known them for two years.** If you have no one else you can use a doctor.

Full name : _____

Address : _____

Relationship : _____

How long have you known them : _____

Contact Preferences

If you do not indicate your agreement for us to make contact with you, we may be unable to provide you with details of products and/or services that may suit your needs and circumstances. We would like to maintain a record of your express consent for us to contact you by telephone, SMS, email for marketing our products or services that we think may be of interest to you. Please indicate your consent to us contacting you by any of the means specified below: **(Please mark how you would like to be contacted)**

Client 1: Phone | SMS | Email | Post

Client 2: Phone | SMS | Email | Post

Sign/Print Name: _____

Sign/Print Name: _____

Assets / Inheritance Tax Record

Please provide approximated figures on your assets below

Real Estate	You (Client 1)	Partner (Client 2)	Joint
Value of Main Residence			
Details of any outstanding mortgage			
Details of any other homes			
Policies	You (Client 1)	Partner (Client 2)	Joint
Details of Life insurance/annuities <i>(Including company length premium or whether it is in trust)</i>			
Details of any death in service policies			
Details of Expression of Wishes / any nominations given related to your policies			
Cash Assets <i>(Approx. Values)</i>	You (Client 1)	Partner (Client 2)	Joint
Building Society / Bank			
Income	You (Client 1)	Partner (Client 2)	Joint
Are you Employed / Self-employed / Retired?			
Details of any Income Salary / Pensions			
Details of any Partnership / Business Assets			
Details of any future legacies			
Other:	You (Client 1)	Partner (Client 2)	Joint
Total value of Personal Belongings such as: <i>House Contents, Jewellery, Cars /Caravans etc.</i>			

Will & LPA Appointments - Frequently Asked Questions

1. Why do I need to send you the information on the instruction form?

Most clients would like to keep costs down. If the information is supplied by you in advance, less time is taken at the meeting trying to ascertain and type-up basic details. If you prefer not to do this, we are happy to take details from you at the meeting, but would make a charge on a time basis for the additional time involved.

2. Do I need to use the instruction form?

No, it is the information we need in a form. Provided that you provide all the information we require, you may set it out in/as an email. It allows us to 'cut and paste' the information to limit word processing errors.

3. I haven't returned the information by email at least 72 hours in advance. What should I do?

You should still come to the appointment with the information or as much of it as you have written out. We shall proceed on the basis that you wish a standard will without any discount for supplying the information in advance. At our discretion an extra charge of £25.00 + VAT may be made for typing up the initial information.

4. I am unable to make the appointment

The non-refundable deposit is to reserve your appointment. If you cancel at the last moment we will be unlikely to fill the appointment with another client. We will rearrange the appointment, if you give us three days (72 hours) notice. Please ensure you receive an acknowledgement within this period to ensure there is no dispute as to whether a message was received.

Please note that you should make rearrangements during our Core Office Hours (Monday-wednesday 10am-4pm). If cancelled within that period we will rearrange without cost on production of a medical certificate. If the appointment is rearranged for another reason, a £10 credit will be given in reduction of making a further appointment.

5. I am unable to proceed; may I receive a refund of the deposit?

The Deposit is non-refundable and is to reserve the appointment and for the initial work involved in making the appointment and sending out this information.

6. What will happen at the meeting?

For a Basic will we check your instructions and take proof of identity and address we will then supply you with the Basic Will with instructions as to how to arrange for it to be executed.

For a Standard will we discuss with you the circumstances in more detail. If you require any trust or complicated provisions or additional documents (e.g. Lasting Powers of Attorney) we will discuss these with you. Any additional costs are on a 'menu' basis, if you decide to proceed. You will be supplied with a draft will to consider either at or after the meeting. For a Lasting Power of Attorney we will discuss capacity and verify the information supplied and seek to answer any questions you might have.

7. Where can I find your Client Care and other Information about your practice?

For Costs & Client Care Information: <http://bit.ly/2w1bb11>

8. What is an exclusion?

An exclusion is where it is proposed that a close member of the family (spouse, partner or child) is treated differently to others of a similar class. This will involve discussion and extra time outside of the work of a standard will. Exclusions can cause considerable problems and so extra care has to be taken if the exclusion does not proceed, there will be a time charge with a minimum of £100 + VAT.

9. Why are Inheritance Tax Issues excluded from a standard will?

Even if you decide to take no steps to minimise IHT, there will be time taken in advising you that the issue exists. Far fewer people have IHT issues than in the past and those who are fortunate enough to have assets exceeding £325,000 for a single person or £650,000 for a married couple will be subject to an initial fee of £100 + VAT, unless we receive advance written notification that such issues are to be excluded.

10. What is an agreed fee?

Unless you inform us in advance that you would like us to work on a time basis, we shall work on an agreed fee (otherwise known as a non-contentious business agreement pursuant to Section 57 Solicitors Act 1974). The fee will be fixed for the work described in the client care letter supplied at the meeting (but not any additional work) and will remain the same irrespective of changes in your requirements or personal circumstances.

11. Why is there an extra charge if another person attends a meeting with me?

An extra person usually has their own questions and this extends the length of the meeting, often considerably. In addition, we have to record why that person is there as there could be suggestions of undue influence. If there is an extra person included we make an addition of £100.00 +VAT per person

12. What additional charges can there be?

The prices quoted (£115-single/ £135.00 couple) are for a standard will as defined as, everything to a partner/spouse and then to the children equally. Exclusions/second families/testamentary capacity/ & inheritance tax issues are outside of the normal and our fee for the "Standard will". Any of these issues will attract an extra fee and can lead to extra work on a time basis.

Even if you do not wish us to take any action in respect of these issues, they have to be considered as we owe a duty not just to you but potential beneficiaries. It involves extra time and risk to us.

13. How long will the meeting last?

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

14. Appointments at your Home

Graham Colley normally undertakes home visits on a time basis. If you ask for a one of his assistants, any advice will be subject to written confirmation, by him. It may be that on discussion an alternative course will be suggested to you.

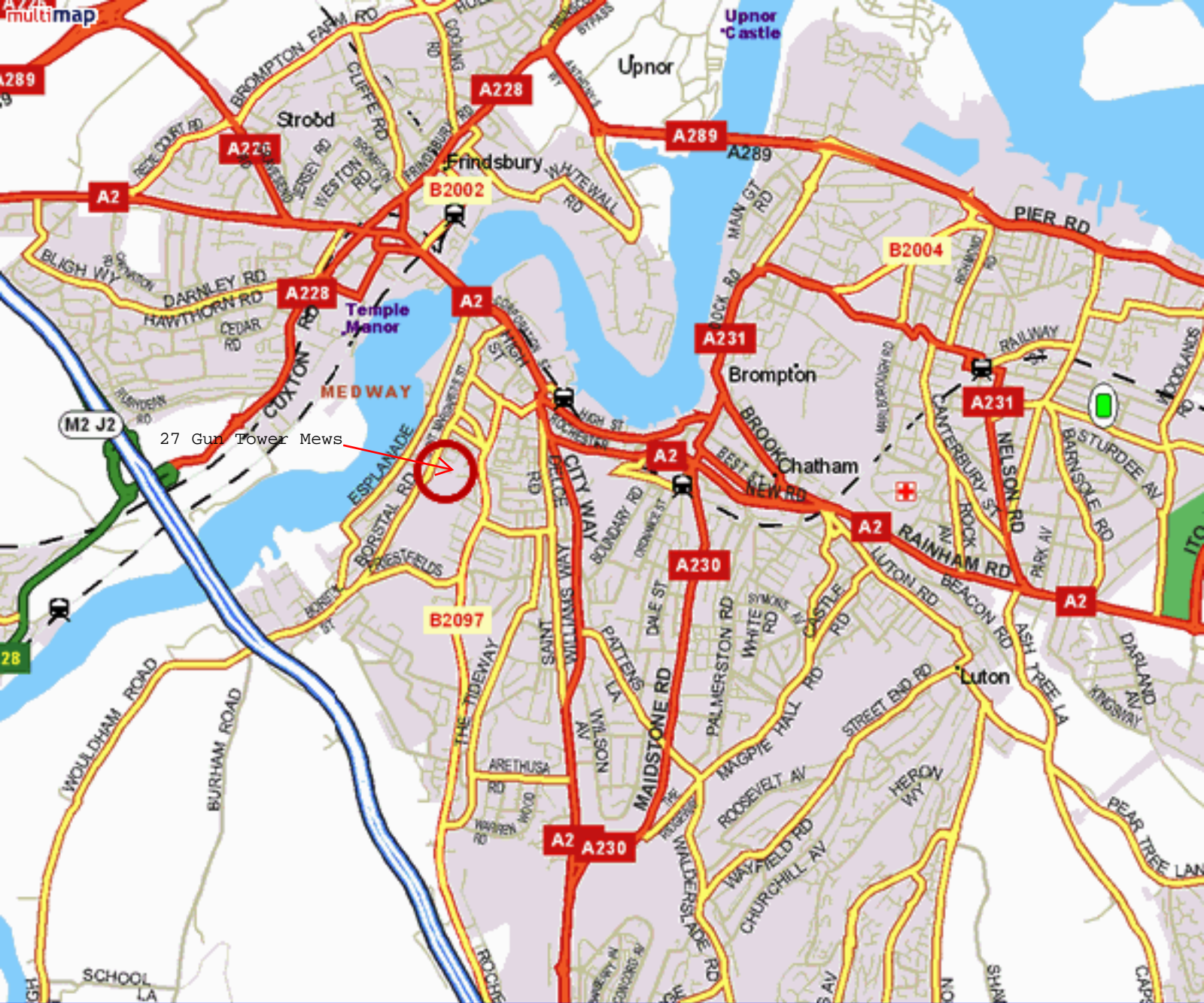
15. what if I decide I do not want a new will after consulting you?

You will be charged on a time basis at the usual hourly rate of the solicitor/assistant involved

Rochester Castle

27 Gun Tower Mews





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