Using our Partner Will and LPA Service

Pavilion Row marketing material available for sending to your clients. Download from the secure area of our website.

Material Includes;

- Leaflet – Why make a Will?
- Leaflet – Why an LPA?
- Leaflet – Guide to making a Will
- How our service works – Clients

Complete the Will Questionnaire and/or LPA Questionnaires with the client.

Supporting Documents;

- Will Questionnaire
- LPA P&F Questionnaire
- LPA H&W Questionnaire

Send the completed forms with Client ID via the secure area on our website or email wills@pavilionrow.com

Pavilion Row contacts the client to discuss the completed form and provide advice.

Summary of advice and draft Will (if appropriate) sent to the client for review.

Final copies sent to the client for signing.

Documents checked and placed in our secure off-site storage.

Tips

Tip
The forms can be used to create financial services opportunities, gain new clients and facilitate planning discussions e.g. IHT, Care Fees and Critical Illness.

Tip
Login to the secure area on our website, www.pavilionrow.com, to access all our documents and leaflets.

Tip
Forms can be completed on your iPad or PC. See 'How to use our forms.pdf.'

Tip
Scribble as much information as you want on the forms. They are designed to give us a basis for our conversation. They are not formal.

Tip
Offering to be one of the witnesses for your client's Will gives opportunity to meet with them again and possibly meet other witnesses.

Additional info

Additional Info
You can contact us at any stage if you have questions, wills@pavilionrow.com or 01904 234 840/0345 634 4185

Additional Info
We pay you a fee for completing the forms on our behalf. Alternatively this can be waived providing a discount to the client.

Additional Info
Subject to client approval we will keep you updated of progress at each stage.

Additional Info
Client will be invoiced at this stage and will be informed that you are to be paid for completing the form/s or if you have chosen to waive the fee a discount will be provided.

If doing LPAs the documents will be checked once signed and registration arranged on clients behalf.

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