Using our Partner Will Service

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

Supporting Documents:

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

TIPS

Use the questionnaire to support wider financial planning conversations, including protection and lifetime IHT planning.

Complete the questionnaire with your client to ensure their Will supports the wider financial planning.

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.

INFO

We pay you a fee for completing the forms on our behalf.

Alternatively this can be waived providing a discount to the client.

If you waive your fee we will inform clients that a discount has been provided at your request.

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.

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

Subject to client approval you will be updated on progress and provided copies of the documents.

Client will be invoiced at this stage.

Final copies sent to the client for signing.

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

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

CONTACT

You can contact us at any stage if you have questions:

- wills@pavilionrow.com
- 0114 2999 584
- 01904 234 840
- www.pavilionrow.com