

# FLOWCHART FOR PREPARATION OF WILL

Action to be taken by Client

Action to be taken by Solicitor

Client arranges appointment to see solicitor at a mutually convenient time and attends office to provide details of their wishes. Financial advisors input sought where required

Solicitor drafts Will in accordance with client's instructions and forwards it to client for checking (not to be signed).

Client reads through draft Will and checks that it has been prepared in accordance with their wishes. Client also checks names of executors and beneficiaries are correct and gifts allocated in accordance with wishes.

Client contacts office to advise of any errors or of any changes required and arranges an appointment to sign original Will.

Any additions or alterations to the Will are made and original prepared for client approval and signature in conference.

Client attends office to sign original Will

Signed original Will is placed in solicitor's safe custody facility for safe keeping.

Client advises executor/s of their appointment and the whereabouts of the Will.