

## **Re: Making a Single Will/ Double Will**

Thank you for instructing this company to handle your case. Everyone here at Champions will do our best to see that everything proceeds as smoothly as possible.

The company itself carries out other areas of work and the following may be of particular interest:

- Conveyancing
- Lasting Power of Attorney (we recommend to clients that an LPA be made)
- Probate
- Family and Mediation

For more details please contact us or see [www.championsolicitors.co.uk](http://www.championsolicitors.co.uk)

### **Responsibility For The Work**

Your file will be managed on a daily basis by Esther Booth [Ebooth@champions.co.uk](mailto:Ebooth@champions.co.uk) who is a Paralegal specialising in Wills and Probate. You can contact Aneeka between 9.00am and 5pm Monday to Friday. You can speak to Mr Stephen Campion on 07970268096 or email [SCampion@champions.co.uk](mailto:SCampion@champions.co.uk) who is the supervisor of the Wills and Probate department.

### **Overall Responsibility**

The Managing Director of this company with ultimate responsibility for this matter is Mr S C Campion [SCampion@champions.co.uk](mailto:SCampion@champions.co.uk). We aim to offer all our clients an efficient and effective service and I am confident that we will do so in this case. However, should there be any aspect of our service with which you are unhappy, and which we cannot resolve between ourselves you may raise the matter with Daniel Priest, a Director and solicitor.

### **Terms of Business**

Please find enclosed our Terms of Business. Please read through these carefully as they provide you with important information about our service and what you can expect from us.

## **Complaints**

If there is a complaint we will try to resolve any problem quickly. We operate an internal complaints handling system to help us to resolve the problem between ourselves. If you have not been able to resolve your complaint with the person who has overall responsibility please contact the Complaints Director is Esther Booth.

Her email address is: [EBooth@champions.co.uk](mailto:EBooth@champions.co.uk)

Further details of our client care policy, including our complaints procedure, are contained in the Terms of Business. Please see clause 23.2 in the Terms of Business which contains the details of the Legal Ombudsman. A copy of our full complaints procedure is available on request.

**The address of the Legal Ombudsman is: PO Box 6806, Wolverhampton, WV1 9WJ; telephone, 0300 555 0333; or view their website at [www.legalombudsman.org.uk](http://www.legalombudsman.org.uk), email enquiries to: [enquiries@legalombudsman.org.uk](mailto:enquiries@legalombudsman.org.uk)**

## **Your personal data and our obligations to you**

When we use your personal data we are regulated under the General Data Protection Regulation (GDPR). This provides you the (“data subject”) with certain privileges and rights and requires us the (“data controller”) to protect your personal data.

We take our obligations regarding the safeguarding and confidentiality of your personal data very seriously. We would like to assure you that we have a good understanding of the relevant provisions under the GDPR. Further information can be found in our Terms of Business under sections 10-12.

**By signing the Authority to Consent form** at the end of this care letter you consent to us not to only collecting your personal data but also consent to us collecting any data you disclose during the course of the transaction in respect of any dependents such as vulnerable adults or children under the age of sixteen.

All emails will be sent to you via our secure messaging platform (mimecast) which can only be accessed with your password. A separate email shall follow providing you with further details.

If you forget your password please request a new one through the platform as passwords are not retained by us.

Should you wish to change your email address in the future, you shall need to complete the verification process once again.

## **Our Fees and Expenses**

Our fee for acting for you in preparation of a **single Will is £120.00 Inc. VAT and for a Double Will £180.00 Inc. VAT** This is on the basis that:

1. That there are no unusual complications in the Will(s).
2. That you do not wish to make substantial alterations in your instructions.
3. That there is no tax advice required with regard to inheritance tax.
4. The maximum limit is £850,000

### **Timing**

I would estimate that this matter would take approximately three to four weeks to conclude from the return of the care letter and the payment of £120.00 or £180.00.

### **Payment on Account**

It is normal practice to ask clients to make payments on account of anticipated costs and expenses.

Payment can be made in two ways and those methods are set out at the end of this letter.

### **Agreement**

As confirmation that you would like us to proceed on this basis, I should be grateful if you would sign the extra copy of this letter enclosed and return it to me. We will then have entered into an agreement which will mean that the fees quoted will be fixed.

### **General Advice**

You have asked me to draft a will on your behalf. I shall draft the will and forward this to you. You should expect to receive the draft within one to two weeks of signing and returning one copy of this letter together with your identification and payment.

When the final Will is agreed then you will either be asked to come into the office to sign it or in the alternative we shall send it out to you to sign. During this period of lockdown you will not be able to come into the office to sign the Will and many of our clients in any event live too far away from our offices to make it practical for them to come in.

### **How to Proceed**

In order for me to proceed further please can you return a signed copy of this letter as set out as above and the payment requested (if not already made).

I appreciate that there is a lot of information to take in initially but should you have queries or wish to discuss the matter with me please do not hesitate to contact me.

## **AUTHORITY TO PROCEED**

I/we, confirm as follows:

- I/we acknowledge safe receipt of the original Terms of Business and Privacy Policy, enclosed with the Client Care Letter or if not enclosed we have seen copies of those documents on the website;
- I/we have read and understand the terms of your Client Care Letter, Terms of Business and Privacy Policy / Statement and authorise you to proceed with the work as detailed on our behalf;
- Where applicable, we authorise you to start work during the 14 day cancellation period outlined in the The Consumer Contracts (Information,

Cancellation and Additional Charges) Regulations 2013;

**Signed** .....

**Dated** .....

**Signed** .....

**Dated** .....

**Method of payment**

There are two methods of payment. Payment can be made to our bank account or by chip and pin over the telephone.

Please complete the appropriate details below.

**Either** I wish to make payment direct into your account and wish you to send me details of the account.

Yes

**Or** I wish to make payment over the telephone by chip and pin

Yes

Please provide telephone number here and we shall ring to take the payment.

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