

By email only

45-49 Mansfield Road
Nottingham, NG1 3FH
Tel: (0115) 9476 373
Fax: (0115) 950 9171
DX: 10132 Nottingham

21 Brunel Parkway
Pride Park
Derby, DE24 8HR
Tel: (01332) 224 570

Car Parking at both offices
www.campionsssolicitors.co.uk

Date:	
Our Ref:	
Please ask for:	Michael Rodgers
Direct Dial:	07727297404
Email:	mrodgers@campions.co.uk
Please reply to:	Nottingham Office

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.campionsssolicitors.co.uk

Responsibility For The Work

Your file will be managed on a daily basis by Michael Rodgers (mrodgers@campions.co.uk) who is a paralegal specialising in Wills and Probate. If Michael is not available, you can contact his colleague Nicole between 9.00am and 5pm Monday to Friday. You can also speak to Mr Stephen Campion on 07970268096 or email SCampion@campions.co.uk who is Michael's Supervisor.

Overall Responsibility

The Managing Director of this company with ultimate responsibility for this matter is Stephen Campion 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.

Identification Requirements

Please follow the identification procedures in the identification sheet attached to this document. It is also in our Terms of Business. **Please note that although the office remains closed during the pandemic we are starting to allow clients to attend the office for identification verification. If you would like to attend the office please email or telephone the numbers provided so that an appointment can be arranged for you to attend. Once an appointment has been agreed further guidance will be provided.**

Terms of Business

The Terms of Business and Privacy Policy are on the webpage. Please read these carefully as they provide you with important information about our service and what you can expect from us.

However, should you require a hard copy please contact us and we will provide you with a copy of the same.

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. The Complaints Director on this occasion Stephen Campion will be the person responsible for handling any complaints. His email address is Scampion@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,

Email enquiries to: 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 £100.00 Inc. VAT/ double will is £150.00 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 £1,000,000.00.

Timing

I would estimate that this matter would take approximately three to four weeks to conclude from the return of the care letter, your identification and the payment of £100.00/£150.00

Payment on Account

It is normal practice to ask clients to make payments on account of anticipated costs and expenses. Please make the payment as requested above.

Payment can be made in two ways (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/ wills on your behalf.

When the final Will has/ wills have been agreed, then you will either be asked to come into the office to sign it or alternatively, we shall send it / send them out to you to sign. This is dependent on whether we are in a period of restrictions due to the pandemic.

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.

Yours sincerely

Michael Rodgers
Campions Solicitors and Estate Agents Limited

*****Both this letter and Authority to Proceed need to be signed by the client before legal work can begin*****

Client(s) to sign here _____

Dated _____

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

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 telephone by chip and pin

Yes

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

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