

How to: Draft a Will



Here's 10 steps to making a Will at Fishers

- 1, Contact Fishers to arrange an appointment to discuss your requirements.
- 2, We will send you confirmation of the appointment, and a questionnaire to fill in ahead of the first meeting. The questionnaire asks for lots of information that may help during the Will-making process, but please don't worry if you can't answer all of the questions, or if some of them don't apply to you. This is just a starting point.
- 3, Attend an initial meeting with one of our friendly team. At this meeting, we will discuss your wishes, priorities and your circumstances. We will look at all of the options available to you, and help you to consider the best way forward. We will ask you questions about what you want to do in your Will and, where appropriate, we will make suggestions about matters you may not have considered. We can also provide advice about your current tax position, information about care fees and also possible challenges to your Will and how best to ensure your wishes are followed after you have gone.
- 4, After our initial meeting, we will send you a summary of our discussions and your instructions, together with our Terms and Conditions of Business information. You will need to sign this and return it to us.
- 5, Once we have received this, we will prepare a draft Will for you to check through.
- 6, We then liaise with you to ensure the Will is exactly the way you want it, and that you fully understand all of its clauses and implications.
- 7, When you are happy with the Will, we arrange a further appointment for you to sign it. Where the Will is signed in our offices, we provide the independent witnesses and ensure that all signing formalities are complied with to make sure the Will is legally valid.
- 8, We can store your signed Will for you in safe custody, and provide copies for you to keep at home.
- 9, We can also register your Will with Certainty, the National Will Register. This can help those left behind know where to find your Will, and can make life easier for them at a very difficult time.
- 10, Finally rest assured that our solicitors are highly qualified specialists, and many hold membership of The Society of Trust and Estate Practitioners, and Solicitors for the Elderly. This showcases their experience and expertise, and our commitment to the highest standards of client care. Our experts are friendly, approachable and understanding, and can help you make a new Will specifically tailored to your own personal circumstances without any stress or worry.

Fishers Solicitors

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