WILLS · A COUPLE

Will instructions

Section 01 is all Aaron needs to open the file and confirm the fee. The rest is what he goes through with you at the appointment, and a blank is an answer.

HOW THIS WORKS

01 **Fill in section 01**
One page. That alone is enough for Aaron to open the file and confirm the fee.

02 **Send it back**
Save the file and email it to aaron@safeharbour.legal, or bring it with you.

03 **One conversation**
Aaron reads it first, so the meeting is spent on decisions rather than on gathering facts.

04 **Draft, then signing**
A draft in plain English, your changes, then Aaron supervises the signing. Do not sign anything until he tells you to.

WHO AARON ACTS FOR

Both of you, jointly, on wills that mirror each other. If your instructions differ, Aaron will say so and may have to act for one of you only.

WHAT IT COSTS

Mirror wills 2 TO 3 WEEKS	**£550** + VAT, so £660
Wills with a trust in them 3 TO 4 WEEKS	**£950** + VAT, so £1,140
Wills with a discretionary trust	**£1,250** + VAT, so £1,500
Severing the joint tenancy and Land Registry restriction	**£150** + VAT, so £180

Your wills cost £150 less when your powers of attorney are done at the same time, because the meetings, identity checks and signing happen once. Every figure is plus VAT at 20 per cent, and the figure with VAT is beside it. Fees reviewed 14 September 2026. What the fee covers, what it does not and anything paid to somebody else are set out on the closing page, and the fee for your own matter is confirmed in writing before any work starts.

SEND IT BACK TO

aaron@safeharbour.legal

01262 310 850 · safeharbour.legal

Answer section 01 and send it. That is enough for Aaron to open the file, confirm the fee and book the appointment. A blank is an answer: it tells him what to ask you about.

IF AN ADVISER SENT YOU THIS

No referral fee is paid or received in either direction.

Adviser name	Firm	Email	FCA or firm reference

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP

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01

Start here

NEEDED TO START
ABOUT 6 MIN

If you fill in nothing else, fill in this. It is enough for Aaron to open the file, confirm the fee and book the appointment.

PERSON 1	PERSON 2

Full name

As it appears on your passport or driving licence

Date of birth

DD / MM / YYYY

Email

Phone

Address, with postcode

If you live at different addresses, give both.

How would you like Aaron to reply?

- ☐ Email
- ☐ Phone
- ☐ Post

Are you married or in a civil partnership?

- ☐ Married
- ☐ Civil partnership
- ☐ Living together, not married
- ☐ Divorced
- ☐ Widowed
- ☐ Single

Do you have children under 18?	☐ Yes	☐ No
Is this a second marriage, or are there children from an earlier relationship?	☐ Yes	☐ No
Are you planning to marry or enter a civil partnership? Aaron has to ask before he drafts.	☐ Yes	☐ No
Do you own a home, and is it in joint names?	☐ Yes	☐ No
Does anyone you want to provide for receive means-tested benefits, or have a deputy or an appointee? It changes what Aaron drafts.	☐ Yes	☐ No
Do you already have a will?	☐ Yes	☐ No
Do you already have lasting powers of attorney? Your wills cost £150 less when your powers of attorney are done at the same time, because the meetings, identity checks and signing happen once.	☐ Yes	☐ No

Do you both want the same thing: everything to each other, then to the same people in the same shares? ☐ Yes ☐ No
Answer no if either of you wants anything different, and say what in section 06.

Roughly what is everything worth, before debts?

A round number. It tells Aaron whether inheritance tax is in play at all.

Who would you like to deal with everything when you die?

One or two names and a phone number. The detail comes later.

Who would you like to inherit what is left, and in what shares?

In your own words. Percentages, fractions or just names. This is the answer Aaron most wants and the one only you can give.

Anything that would make this easier

Someone else Aaron can contact if he cannot reach you, and their number

Anything that would make it easier to deal with Aaron

Hearing, sight, reading, a language, a time of day, or someone you would like with you.

That is section 01 finished

Your name

Signature

Date

DD / MM / YYYY

Send it now to aaron@safeharbour.legal if that is as far as you have got today. It is a complete thing to send. The rest of the form is what Aaron goes through with you, and you can send it later or bring it with you.

02 The rest of your details

ONLY IF IT APPLIES
ABOUT 3 MIN

The parts of the picture Aaron needs before he can draft, rather than before he can quote.

Any former names, for example a maiden name

Occupation, or last occupation

Have you ever lived, worked or held property outside the UK? ☐ Yes ☐ No
A holiday home, a bank account abroad, shares in a foreign company, or years spent working abroad. Say what and where in the box below.

Has a husband, wife or civil partner of yours died? ☐ Yes ☐ No

If one has, did they leave everything to you?
Aaron will need their death certificate and their will.

☐ Yes ☐ No

In how many of the last 20 tax years have you been living in the UK?

If you were abroad, which years and where

A rough number is fine.

Where the existing will is kept, if there is one

Have you made a will in any other country, or one that deals with property in any other country? Where, and when

Answer this one even if you are not sure. Aaron writes the new will differently where there is one abroad.

Why you are making a new will now

One or two lines. A new house, a new grandchild, a divorce, a falling out. It is the most useful thing on the form.

03

Family and dependants

ONLY IF IT APPLIES
ABOUT 3 MIN

Everyone who might expect to be provided for, whether or not they are in the will.

Your children

Include step-children and adopted children, and say which is which. Include a child who has died, and say whether they left children of their own. If you do not know a date, write 'to check'. It is a better answer than a gap.

FULL NAME	DATE OF BIRTH	RELATIONSHIP	ANYTHING AARON SHOULD KNOW
EG Kate Ellis	14 / 06 / 1992	daughter	about to divorce

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Does anyone else depend on you financially?
A parent, a sibling, a grandchild, or anyone you support.

☐ Yes ☐ No

Is anyone likely to be unhappy with what your will says?
Better said now, in confidence, than found out afterwards.

☐ Yes ☐ No

If yes to either, who and why

04

Who deals with the estate, and who looks after young children

ONLY IF IT APPLIES
ABOUT 6 MIN

The one thing a meeting settles in half a minute and a list of names cannot say: who, and when each of them comes in. Several questions in this pack have a line saying you would rather talk it through. Ticking more than one is normal and it is what the meeting is for.

Answer every tick-one question in this section separately for each of you. You do not have to give the same answer.

When you die, who should deal with the estate? Who picks up the phone to the bank?

PERSON 1	PERSON 2	
☐	☐	**My husband, wife or partner, on their own** They apply for the grant and act without consulting anyone. Nobody is checking what they do as they go along, and the people who inherit see the accounts at the end, or if they ask for them.
☐	☐	**One person who is not my husband, wife or partner** Your husband, wife or partner has no part in dealing with the estate. If that one person dies before they have finished, the job passes to whoever is dealing with their estate, not to anyone you have chosen.
☐	☐	**My husband, wife or partner, together with one or more other people named below** Everyone named is on the grant. All of them must join in selling or transferring land. Any one of them, acting alone, can close a bank account or sell investments.
☐	☐	**Two or more named people, none of them my husband, wife or partner** Every one of them has to be told before the grant is issued, and each either signs, stands aside, or gives it up. Someone who cannot be found can be dealt with, but it slows things down.
☐	☐	**Whichever of my children are alive, over 18 and willing** The job goes to whoever qualifies at the time, so nobody has to be replaced for having died or not wanting it. If none of them is able or willing at the time, the job falls to whoever the rules say can apply. Tick this and leave the group marked FIRST below blank.
		None of these. What I want is
☐	☐	**I would rather go through this one with Aaron before I answer** Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

The grant holds four names. You can name more, and Aaron will tell you how that works. Who steps in if one of them cannot act is the schedule below, in the group marked IF ONE OF THEM CANNOT ACT. Nobody in the group marked FIRST is a stand-in.

The people you are naming

Someone who inherits under your will can also be an executor.

	FULL NAME	ADDRESS, WITH POSTCODE	HOW THEY ARE RELATED	PHONE OR EMAIL	WHO THEY WOULD STEP IN FOR	WHOSE WILL
FIRST EG	Jane Ellis	14 Tennyson Avenue, Brid	sister	07700 900123		
IF ONE OF THEM CANNOT ACT						
IF NONE OF THEM CAN ACT						

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Leaving a group blank means there is nobody there. What happens then is the last question in Who inherits.

	YES	NO	NOT KNOWN
Have you asked them whether they are willing to do it? An executor who was never asked is the commonest reason a will has to be redone.	☐ Yes	☐ No	☐ Not known
Does any of them live outside the UK?	☐ Yes	☐ No	☐ Not known
Is any of them likely to be a witness when you sign? It changes who Aaron asks to be in the room when you sign.	☐ Yes	☐ No	☐ Not known
Is any of them someone who would expect to be paid for their time? An accountant, a financial adviser, or a firm.	☐ Yes	☐ No	☐ Not known

Would you like Aaron, or his firm, to be an executor as well as or instead of the people above? ☐ Yes ☐ No

He will say at the meeting what that would cost the estate and whether it is needed. Nobody has to choose it.

Guardians

Only if you have children under 18.

Who you would want to bring the children up if there were no parent left to do it. Aaron works out at the meeting whether that is your position.

	FULL NAME	ADDRESS, WITH POSTCODE	HOW THEY ARE RELATED TO THE CHILDREN
FIRST			
IF THEY CANNOT ACT			

Have you asked the guardians whether they are willing? ☐ Yes ☐ No

Should the people holding the children's money be able to pay the guardians towards the cost of bringing them up? ☐ Yes ☐ No
A bigger house, a bigger car, school costs. Say how much, or leave it to the trustees, in the box below.

Anything about the children's upbringing the guardians should know

Schooling, religion, staying near family. It goes in a private letter of wishes, which section 08 asks about.

05

What you own

Approximate values are fine. Aaron is sizing the estate for tax, not auditing it.

ONLY IF IT APPLIES
ABOUT 5 MIN

Property

Names, rather than "jointly". Include a holiday home, a rented-out property and anything abroad. Aaron checks how each one is held at the Land Registry rather than asking you to, and tells you what he finds.

PROPERTY ADDRESS	WHOSE NAMES ARE ON THE TITLE	ROUGHLY WHAT IT IS WORTH	MORTGAGE LEFT
EG 31 Marton Road, Bridlington	me and my husband	about 240,000	about 60,000

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Have you ever signed anything saying you own a property in shares? ☐ Yes ☐ No
A declaration of trust, or wording in the deeds.

Roughly how much is in your accounts, investments, ISAs and shares, added up?

One round number for all of it. Aaron asks for the detail only if the tax position needs it.

Pensions

Include old pots from previous jobs. Who is nominated is on your annual statement or in your online account. If you do not know, write 'to check'.

PROVIDER	WHAT IT IS	ROUGHLY WHAT IT IS WORTH	WHO IS NOMINATED
EG Aviva	old works pension	about 12,000	my wife

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Life insurance

Include death in service through work. Say whether a policy is already written in trust.

INSURER	WHAT IT IS	ROUGHLY WHAT IT PAYS	WHO IS NOMINATED
EG Legal & General	level term	about 150,000	my wife

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Do you have a business, a share in a business, farmland or farm buildings?	☐ Yes	☐ No
Do you hold cryptocurrency or anything else of value held only online? Say where the access details are kept. Do not write them here.	☐ Yes	☐ No
Do you have debts beyond a mortgage that Aaron should know about?	☐ Yes	☐ No
Is anyone in the family paying for care, or likely to be?	☐ Yes	☐ No

If there is a business or a farm, who runs it day to day and what should happen to it

Say whether there is a partnership or shareholder agreement, and who the other owners are.

Online accounts: email, photos, social media, subscriptions. What should happen to them, and where the list is kept

No passwords on this form.

If yes to anything else above, the detail

Everything Aaron cannot draft without is now answered. The rest can wait for the meeting if you would rather stop here: send back what you have and he will pick the remaining questions up with you.

06 Who inherits

ONLY IF IT APPLIES
ABOUT 8 MIN

Particular things first, then gifts to charity, then who takes what is left over. The questions with a line under every answer are the ones where the answer changes the document, so each line says what it changes.

Particular things, and sums of money

Describe a thing so that a stranger could pick it out of a room. A sum of money is a line here too. Tick one on every line you use: it says where that gift goes if the person named does not outlive you. Leave a line blank and it falls into what is left over.

WHO GETS IT	WHAT THEY GET	THEIR SHARE THEN GOES TO
EG my sister Ruth	my mother's engagement ring, three stones	
		☐ INTO WHAT IS LEFT OVER ☐ TO THEIR CHILDREN ☐ SEE SHEET C

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		☐ INTO WHAT IS LEFT OVER ☐ TO THEIR CHILDREN ☐ SEE SHEET C
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		☐ INTO WHAT IS LEFT OVER ☐ TO THEIR CHILDREN ☐ SEE SHEET C

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Gifts to charity

The registered number is on the charity's website and on its letters. If you do not know it, the name and the town are enough for Aaron to find it.

CHARITY	REGISTERED NUMBER	AMOUNT OR SHARE

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Pets: who should take them, and any money to go with them for their keep

The animal, the person, and a sum if you want one. Write none if you have no pets.

The rest of your estate

Everything left after debts, tax and the gifts above. This is the most important part of the will.

On the first death, what does the survivor get?

PERSON 1 PERSON 2

☐ ☐ **The survivor can live in the home and receive anything the money in it earns, and then it passes to the people I name below**
The survivor can live there and take what it earns, but cannot sell it and spend it, and cannot leave it to anyone. When the survivor dies it passes to the people you name now. If you own your home jointly, Aaron also changes how it is held, which is the severing item on page one.

☐ ☐ **A set share to named people on the first death, and the rest to the survivor**
Those people receive their share on the first death, and the particular things and sums of money in this section are paid out then too. The survivor takes what is left, with no strings.

☐ ☐ **Everything to the survivor, and the gifts you have listed wait until the second death**
The survivor takes the whole of it. They can sell it, spend it, give it away, and leave it to whoever they choose. The particular things and sums of money you have written do not take effect until the second death.

None of these. What I want is

☐ ☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

If you ticked the first answer, who it passes to after that

If you ticked the second, who takes a share and how much

Names, and the share each of them takes.

If the home is sold, should the right to live there move to the next home they buy? ☐ Yes ☐ No

Is there anything that should bring the right to live there to an end

Write it rather than leaving it: ending it on a remarriage or on somebody moving in is a decision with consequences, not a box.

Two of the answers above change the document from a standard will to a trust will. Both figures are on page one, and Aaron confirms in writing which one applies before he drafts, and whether any tax arises on the first death.

Do you both want the same thing on the second death? ☐ Yes ☐ No
If not, say whose will each line below belongs to.

On the second death

Shares as percentages or fractions that add up to the whole. If you both want the same thing, leave the last column blank. Tick one on every line you use. "Down that line" keeps that share in that branch, passing to that person's children, and to their children after them. "The others" divides it between whoever is still alive, in the same proportions as the shares you have written, and that person's own family receive nothing from this estate. Leave a line blank and Aaron drafts it down that line where the person is your child or grandchild, and back into what is left over for anybody else.

WHO INHERITS	RELATIONSHIP	SHARE	THEIR SHARE THEN GOES TO	WHOSE WILL
EG Kate Ellis	daughter	one third		both
			☐ DOWN THAT LINE ☐ THE OTHERS ☐ SEE SHEET C	
			☐ DOWN THAT LINE ☐ THE OTHERS ☐ SEE SHEET C	

WHO INHERITS	RELATIONSHIP	SHARE	THEIR SHARE THEN GOES TO	WHOSE WILL
			☐ DOWN THAT LINE ☐ THE OTHERS ☐ SEE SHEET C	
			☐ DOWN THAT LINE ☐ THE OTHERS ☐ SEE SHEET C	
			☐ DOWN THAT LINE ☐ THE OTHERS ☐ SEE SHEET C	

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

If everyone you have named dies before you, who should inherit?

☐ **Down my family line: to my children, and if one of them has died, to their own children, and so on**
The estate follows your own descendants as far down as it has to go before it looks anywhere else, which can carry a share to a great-grandchild you never met.

☐ **Named people, written below**
If those people have died too, this part of your estate is back where it started and passes under the rules that apply where there is no will.

☐ **A named charity, with its registered number, written below**
The charity takes it whatever your family's circumstances are by then, and your family cannot redirect it afterwards without the charity agreeing.

☐ **Split between the charities I have named earlier in this form**
If you have not named any, this does nothing.

None of these. What I want is

☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

If you ticked named people, who

If you ticked a charity, its name and registered number

Leave this question blank and Aaron drafts nothing for it, so the part of your estate nobody is left to take passes under the rules that apply where there is no will.

Somebody who inherits dies only days after you. What should happen?

☐ **Treat them as having died before me unless they outlive me by a number of days, written below**
Their share is dealt with the same way as if they had died before you, under the tick on their line.

☐ **Whoever outlives me inherits, however briefly**
Their share passes into their estate and is distributed under their will, or under the rules that apply if they have no will.

None of these. What I want is

☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

Number of days, if you ticked the first answer

Up to six months. Leave the number blank and Aaron drafts thirty days.

If a share is held for someone under 18

When should they be able to ask for it?

- [ ] No fixed age. The trustees decide when each child gets anything, and how much
  No child can ask for it at any age. The trustees choose.
- [ ] At 25
  The trustees hold it seven years longer than they would at 18.
- [ ] Part at one age and the rest at a later one
  They get a stated part on the first date and the balance on the second.
- [ ] At 21
  The trustees hold it three years longer than they would at 18.
- [ ] At 18
  On their eighteenth birthday they can ask the trustees for the whole share, and the trustees have to hand it over.

None of these. What I want is

- [ ] I would rather go through this one with Aaron before I answer
  Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

The age you pick changes both the fee and the running tax cost of the trust. Aaron sets out both in writing, against your answer, before he drafts.

Who should look after a share held for a child?

- [ ] A different group, named below
  The people dealing with your estate hand over to them once the estate is settled.
- [ ] The same people, and one more named below so there are always at least two
  A second name on the trust means a second signature on the paperwork and a second person with sight of the money.
- [ ] The same people as the executors
  One set of people from the death until the youngest child takes their share, which may be twenty years.

None of these. What I want is

- [ ] I would rather go through this one with Aaron before I answer
  Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

Names and addresses, if you ticked either of the first two

Is there anyone you want to leave out deliberately? ☐ Yes ☐ No
Aaron will ask you why, and will record the reason.

Anything about the answers above that Aaron should know

07 Gifts you have already made, and any trust you are part of

ONLY IF IT APPLIES
ABOUT 3 MIN

Anything you have given away in the last seven years, and any trust you set up or benefit from. Aaron needs the picture to size the estate.

No gifts beyond birthdays and Christmas? Go straight to 08.

Anything beyond ordinary presents, in the last seven years. If you do not remember a date, write the year.

DATE	WHO RECEIVED IT	WHAT IT WAS	ROUGHLY HOW MUCH
EG June 2021	my daughter Kate	help with a house deposit	about 15,000

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

Do you make regular gifts out of your income? ☐ Yes ☐ No

Are you a settlor, a trustee or a beneficiary of any trust? ☐ Yes ☐ No
Including a trust under someone else's will, and a life policy written in trust.

Have you given anything away that you still use or live in? ☐ Yes ☐ No
For example a house you gave to a child and still live in.

If yes to any of those, the detail

For a trust: what it is called, roughly when it was set up, who the trustees are and what it holds. Bring the deed if you have it.

08 Funeral wishes, and anything else

ONLY IF IT APPLIES
ABOUT 2 MIN

None of this is needed for Aaron to draft. It is what your family will look for first.

Burial or cremation

☐ Burial ☐ Cremation ☐ No preference

Any particular wishes about the funeral

Where, what kind of service, what should happen to the ashes, organ donation. A line or two is enough.

If there is a pre-paid plan, who it is with and the plan number

Do you have a pre-paid funeral plan?	☐ Yes	☐ No
Would you like a private letter of wishes alongside the will? For guardians, for trustees, or for anything you would rather say privately. It can be changed later without changing the will.	☐ Yes	☐ No
Is there anyone, apart from your executors, who should be told where the will is kept? Their name and how to reach them go on the closing page.	☐ Yes	☐ No

Anything else Aaron should know

A family situation, a promise you have made, a business that has to keep running, or anything above that would not fit.

09

Seven things the will has to settle

NEEDED TO START
ABOUT 2 MIN

These get settled whether or not anybody asks you. Here is what Aaron would write, so you can stop him.

Tick a box on every line. Asking Aaron to put one to you costs nothing and does not change the fee. Nothing here outranks what you have already written: where the two differ, what you wrote wins. A blank is read as ask me first.

	PERSON 1		PERSON 2	
	ASK ME FIRST	THAT IS FINE	ASK ME FIRST	THAT IS FINE
Debts, the funeral and the cost of dealing with everything come out of what is left over, not out of the particular gifts you listed.	☐	☐	☐	☐
A house or car you leave to a named person carries the mortgage or loan on it, unless you tell him otherwise.	☐	☐	☐	☐
Whoever receives a particular thing collects it, and pays what it costs to move it and insure it.	☐	☐	☐	☐
Anything in your home that you have not listed passes with the rest of your estate, rather than to whoever is living there.	☐	☐	☐	☐
The people dealing with your estate get their expenses back and nothing for their time.	☐	☐	☐	☐
They may give someone an item instead of cash, at its value on the day, without needing that person's agreement.	☐	☐	☐	☐
Anything held for someone under 18 is invested rather than left in a bank account, and may be spent on that child's keep and education.	☐	☐	☐	☐

Anything else you would rather he did not decide for you

10

Before you send it

What happens to your answers, what to bring, and where to sign.

NEEDED TO START
ABOUT 2 MIN

What Aaron will need to see, at or before the appointment

- Photo ID for each of you
- Something with your address on it, dated in the last three months
- Any will you already have
- The title number or the deeds for your home
- Pension and life policy paperwork
- The deed of any trust you are part of

Tick what you already have. Nothing has to be sent with this form, and nothing missing here delays the work.

What the fee covers

Taken from the schedule on page one. The fee for your own matter is confirmed in writing before any work starts.

WHAT THE FEE COVERS
Instructions from both of you, two wills that mirror each other, supervised signing.

NOT INCLUDED
A trust in the wills, tax advice, letters of wishes, severing a joint tenancy and foreign assets are separate items.

PAID TO SOMEBODY ELSE
Land Registry official copies, £7 (per document, HM Land Registry, no VAT).

ONBOARDING AND IDENTITY CHECKS
Only if you choose wills with a trust in them or wills with a discretionary trust. Then it is £20 plus VAT, once, for the matter, and an identity check of £6.25 plus VAT for each of you. Anything else on page one carries neither, and it is confirmed in writing before any work starts.

Two things to agree

- Tell the adviser named on page one when the matter opens, with the agreed fee, and again when it is signed.
- Ordinary email is fine for documents about my matter, and I have read the warning about money below.

Where the originals go

Where you would like the signed originals kept

With Aaron, with you, or somewhere else.

Who else should know where they are

A name and a phone number is enough.

Did anyone help you fill this in, and which parts?

Their name and how they are related to you. Write none if you did it yourself.

Signed

Type your name, or print this page and sign it by hand.

Person 1, full name	Signature	Date
		DD / MM / YYYY
Person 2, full name	**Signature**	**Date**
		DD / MM / YYYY

Your information
MDLS Solicitors Limited is the controller for the information on this form. It is used to advise you and to carry out your instructions, and is kept as long as the file and the professional record require. It is not sold, and it is not shared outside the firm without your consent except where the law requires it. The data protection officer is Matthew Dowell, md@legalstudio.co.uk. The firm is registered with the Information Commissioner under ZA057790, and you can complain to the Commissioner at ico.org.uk.

If something goes wrong
If something goes wrong, say so. Tell Aaron first, on 01262 310 850 or at aaron@safeharbour.legal. If that does not settle it, write to Ian McCann, Solicitor and Chief Executive, at ijm@legalstudio.co.uk or on 0113 247 3800. You will have an acknowledgement within five working days and an answer within eight weeks. After that, or if eight weeks pass, you can take the complaint to the Legal Ombudsman at enquiries@legalombudsman.org.uk, on 0300 555 0333, or at PO Box 6167, Slough, SL1 0EH, within six months of the firm's final answer and within one year of the problem. The Solicitors Regulation Authority deals separately with conduct, at sra.org.uk.

Money
Safe Harbour's bank details do not change during a matter, and Aaron will never email to say they have. If you get any message asking you to send money somewhere new, telephone 01262 310 850 before you send anything.

C

More room, if you need it

ONLY IF IT APPLIES

Spare ruled lines for anything that did not fit in a list earlier in the form. Most people never use this page.

Your name

Date

DD / MM / YYYY

Write the section number and the name of the list on the left, then the answer on the right, in the same order as the columns on that list. One line for each thing.

SECTION AND LIST	YOUR ANSWER, IN THE SAME ORDER AS THAT LIST'S COLUMNS
EG 05 Pensions	Aviva, old works pension, about 12,000, my wife

If you have printed the form, print this page again for as many lines as you need. If you are typing and you run out of lines, put the rest in the body of the email. Nothing is lost that way.

A

At the meeting

Completed by Aaron, not by the client.

FOR THE FIRM

Instructions and what was said, in the client's own words, with their reasons

The note that answers, years later, what was said and what was understood.

Date	From and to	Where	Everyone present
DD / MM / YYYY		Office, home, telephone, video	

Client seen on their own for part of the meeting	☐ Yes	☐ No
Instructions given by the client, not through anyone who benefits	☐ Yes	☐ No
Identity verified, evidence on the file	☐ Yes	☐ No
Conflict check run and clear	☐ Yes	☐ No
Source of funds and of wealth understood and recorded where relevant	☐ Yes	☐ No
Client care letter and terms of business sent	☐ Yes	☐ No

ID: what was seen. Type and expiry only, no numbers on this sheet	How checked	File reference
	Original, certified copy, electronic	

Understood, in their own words. What was observed, not a conclusion

- What they were making, and its effect
- Who might expect to benefit
- Medical opinion sought
- What they owned, broadly
- No disorder affecting the decision
- Not needed, reason in the note above

Scope	Fee agreed, plus VAT	Matter reference	Signed and dated

WHAT HAPPENS NEXT	WHO	BY WHEN

A2

Seven things the will has to settle

FOR THE FIRM

The other half of section 09. Work down it with them, in their order, and record what they say rather than what was ticked.

Copy across what came back on the form, then put each line to them. A line nobody reached is NOT PUT: leave it showing and raise it before signing. CHANGED means the will departs from the default, and the departure belongs in the draft, not in this box.

RESULT, ONE OF: CHOSEN ACCEPTED CHANGED NOT PUT OPEN

LINE	TICKED ON THE FORM	PUT TO THEM TODAY	THEIR ANSWER, IN THEIR WORDS	RESULT
Debts, the funeral and the cost of dealing with everything come out of what is left over, not out of the particular gifts you listed.				
A house or car you leave to a named person carries the mortgage or loan on it, unless you tell him otherwise.				
Whoever receives a particular thing collects it, and pays what it costs to move it and insure it.				
Anything in your home that you have not listed passes with the rest of your estate, rather than to whoever is living there.				
The people dealing with your estate get their expenses back and nothing for their time.				
They may give someone an item instead of cash, at its value on the day, without needing that person's agreement.				
Anything held for someone under 18 is invested rather than left in a bank account, and may be spent on that child's keep and education.				

TWO BOXES UNDER 'TICKED ON THE FORM': PERSON 1, THEN PERSON 2

B

For the adviser who sent this

NOT PART OF THE FORM

For the financial adviser, accountant or broker who passed this on. Nothing on this page is part of the form.

What happens to a referral

Aaron reads the form before he meets the client, confirms the fee in writing, and does the work. No referral fee is paid or received in either direction, and the client is charged the same as anyone else. If the client has ticked the box on page one, you are told twice: when the matter opens, with the agreed fee and the expected date, and again when the documents are signed. Nothing else is sent to you, and your own details are used for those two messages and nothing else. They are not added to any list and are not passed on.

What Safe Harbour does not do

01 No investment advice, no products, no commission, and no financial promotions.
02 No approach to your client about anything you have not asked for.
03 No fee for the referral, in either direction.
04 Nothing signed without Aaron speaking to the client, on their own for part of it.

Data protection, when you forward a form

If your client returns the form themselves, MDLS Solicitors Limited is the controller from the moment it arrives and you never hold their answers. If you forward a completed form, you are processing your own client's information under your own registration and Aaron becomes a separate controller when he receives it. The cleaner route is to send the blank form and let the client return it.

Getting hold of Aaron

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP. Telephone 01262 310 850, or aaron@safeharbour.legal. Regulated through Legal Studio, with the professional indemnity insurance and the complaints route that brings; the complaints route is printed in full on the client's own closing page. Check the register at sra.org.uk under SRA ID 598793.

Bridlington Priory
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