

All about Will Aid Guidelines for Reception



ANTONIO OLIMOS / ACTIONAID

As the first point of contact for clients, you play an important role in the success of Will Aid. Keep these guidelines handy so that you can welcome new clients to your firm and help raise vital funds for those in need around the world.

Will Aid - this November

ALL MONEY RAISED BY WILL AID SUPPORTS THE WORK OF:

ACTIONAID | BRITISH RED CROSS | CHRISTIAN AID
HELP THE AGED | NSPCC | SAVE THE CHILDREN UK
SCIAF | SIGHTSAVERS INTERNATIONAL | TROCAIRE



All about Will Aid

Will Aid has a simple yet compelling objective – to help everyone one in the UK to get their affairs in order by drawing up their Will and at the same time to build a brighter future for disadvantaged people.

This November, instead of charging for drawing up a basic Will, participating solicitors will waive their usual fee and ask instead that the client donates to Will Aid the fee they would normally charge. The suggested donation levels are £75 for a single Will, £110 for a pair of mirror Wills and £40 for a Codicil. The funds raised are used by nine of the UK's leading charities to help children, families, the elderly and whole communities in need around the world.

Guidelines for Reception

Receiving enquiries

From **August** onwards Will Aid will be running a nationwide publicity campaign. Articles in your local papers will contain details of local participating solicitors, and the public will also obtain details of your firm from the Will Aid website and telephone hotline. People will be invited to telephone or email you directly to make an appointment. **November** is the publicised will-making month, but you are welcome to accept instructions beforehand or afterwards as suits your firm best.

Publicising the scheme

Will Aid has provided your firm with leaflets and posters about the scheme. It would be very helpful if you could display the posters in your window or other prominent location and make leaflets available in your reception area and to other clients.

Dealing with queries

The Will Aid scheme covers the drawing up of a basic Will or Codicil. If the client has complicated instructions or requires inheritance tax advice, the solicitor is free to charge his or her normal rates for the additional work, having first advised the client of the fees involved.

How many appointments?

As many as you can manage! When your firm has reached its limit, please contact us immediately so that we can direct enquirers elsewhere. Please advise any callers to phone 01460 271178 to get details of another participating solicitor in the area.

The Will Aid donation

The solicitor will invite the client to make a donation when s/he has accepted the client's instructions. While the donation is voluntary (otherwise it would be liable for VAT) a minimum level is suggested to reflect the amount of professional time which the solicitor is giving free of charge. Cheques should be made out to Will Aid and are forwarded to the Will Aid office. It is not possible for clients to make donations to charities other than Will Aid through this scheme.

Who is eligible under the scheme

Will Aid is open to everyone – there are no age restrictions and while charitable legacies are very welcome, there is no requirement to make such a bequest. All we ask is that the will-maker considers making a donation at the suggested level to reflect the value of the service that they will receive.

Telephone the Solicitors' Helpline on 01460 271178

Email us at: enquiries@willaid.org.uk Check out our website at: www.willaid.org.uk

Address: Will Aid, Freepost SWB11047, Crewkerne, Somerset TA18 7ZB