

Wills Month Terms and Conditions

Members of the public, for example supporters of the Hospice, hereon known as the client, register with the Hospice to receive Will making services. Those registered, can then receive services during the Wills Month campaign either with participating local solicitors and estate planners. All service suppliers will waive their usual fee for writing a Will in exchange for a minimum fee to be paid directly to St Helena Hospice: £130 for single Will and £180 for a joint Will. The campaign runs from 1st to 31st October 2024, though the clients registered, may attend appointments within reason outside these core campaign dates if agreed. We ask people to consider a gift in their Will to St Helena Hospice, but people are under no obligation to do so.

Booking

Clients must register for the offer with St Helena Hospice to enable an appointment to be booked, to make or update a simple will or joint will. If taking a joint will, only one client needs to register. Registrations are to be made via our website, by email, or by telephone. We reserve the right to close registration before the end of 31st October 2024, should available appointments reach capacity across participating solicitors and estate planners. Should your preferred choice be unavailable, bookings may be made via an alternative whilst availability continues.

Appointments

Under no account should any prospective client contact a solicitor, or estate planner direct before registering with the Hospice for the offer. Once registered with us, should a client prefer a solicitor appointment we will provide the client with a client referral number, included on their client referral form which is sent to the client by post and email. The referral number must be stated to the solicitor by the client to enable an appointment to be booked, and services to be provided under the terms of the offer. The Hospice will share to the chosen solicitor the client name, preference for the time of day for an appointment, whether the appointment is for a single will or joint will, telephone number and client referral number. As processes can vary how they work, where applicable the Hospice will confirm to the client the appointment booked for them, and inform the participating office of the client attending.

Minimum Fee

Clients will be asked to make a minimum fee when their appointment, or opportunity to commence services are confirmed. The minimum fee for services are £130 for a basic will and £180 for a mirrored (joint) will. The fee can be made at time of registration, or 48 business hours before the appointment booking. Payment may be made over the telephone by card, by post with cheque payable to St Helena Hospice, or via our website (referencing Will month). If you wish to donate via BACs, please advise us of you intention and we'll supply banking details.

Delivery of service

The minimum fee is asked or in lieu of the normal fee chargeable for writing of a basic or mirrored Will. Clients must state their needs when beginning to take services from the solicitor, or estate planner. At any time, it is apparent client needs are more complex, clients will be liable for the fee over and above what is included in the standard service. The solicitor, or estate planner will pre-agree the additional fee directly with the client.

Client Identification

As required by the solicitor, and or estate planner acceptable identification documents must be provided upon request by the client, to enable services to be completed. Photographic ID such as a passport or driving license, plus address identification such as a bank statement or utility bill is normally acceptable and this will be determined by the solicitor, or estate planner.

Completing the Will

Upon completing a Will, the client referral form issued to the client at the point of registration should be completed by the client and returned to the Hospice. It is acceptable for clients that took services from a solicitor to pass their completed form to the solicitor, for safe forwarding to the Hospice. The Hospice requires the form to enable thanking of any clients choosing to pledge a gift in their will, to administrate any donations made and to evaluate the client gifting behaviour during the campaign. We may contact clients after the receipt of the form, to make enquiries as to their satisfaction levels of the service and the campaign, and also to ask if they would be willing to contribute to future marketing work by engaging in case studies, stories, or by reviewing the offer. Clients may decline any or all of these opportunities to engage with us, after receipt of the form.

Cancellation or postponed appointments

If for any reason a client is unable to attend an appointment, the client should let the solicitor / estate planner know so this can be rearranged between the client, and the solicitor / estate planner.

Refunds and cancellations

Fees are non-refundable. In exceptional circumstances refunds will be considered on a case by case basis. We will not be liable for any damage, costs, loss, or injury incurred by the client in taking part in Wills Month.

Complaints

If a client feels they have any cause to complain about any aspect of Wills Month, or wish to offer suggestions for its improvement, please contact Rosalyn Leclercq, Senior Philanthropy Manager by email rlleclercq@sthelena.org.uk or by phone. Alternatively you can contact the solicitor /estate planner directly if this relates to them.

Contact

If you have any questions about these terms and conditions, please contact us at the below

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