



Client Charter

The Charter sets out your rights as a client of a Member of the Society of Will Writers, and the Obligations that the Member has to you as a client.

The member is covered by Professional Indemnity Insurance and is obliged to provide you with proof of this if requested. The member is bound by The Society's code of conduct and disciplinary and complaints procedures, copies of which are available from the Society upon request.

The member is obliged to provide a quotation – in writing if requested – of the price to be paid for the preparation of your will or Wills, including any extra costs that be incurred, before proceeding to prepare your Will or Wills. If more than one Will is to be prepared, the member is obliged to provide a quotation of the prices of both Wills either separately or as a set of Wills.

The member is obliged to advise you of the length of time it will take to prepare your Will or Wills in either draft or finished form. The member is obliged to comply with these service standards or advise you in good time if there is any reason for the delay.

You are entitled to a refund of any money paid in respect of preparation of your Will or Wills should you change your mind. However, if you have received your Will or Wills in draft or finished form then any refund is at the members discretion and may be subject to charges for work carried out at your instruction, except in the case of complaint duly investigated by The Society (see paragraph 7 below) where the member is found to be at fault in the whole or part in which case any refund will be at The Society's discretion.

The member may suggest other goods or services that he or she may provide. You are under no obligation to purchase any goods or services in addition to your Will or Wills. If the member offers a discounted price for your Will or Wills provided you purchase other goods or services, then you are entitled to be informed of the prices of the Will or Wills both with and without the purchase of the additional goods or services.

The member undertakes to maintain the strictest client confidentiality and not to pass your name to any other organisation without your express permission.

If you have reason to complain about the service you receive from the member, you should first direct your complaint to the member who is obliged to deal with your complaint immediately. If you are not satisfied with the way in which the member deals with your complaint or if the complaint has not been dealt with, then you are entitled to complain to The Society of Will Writers who will undertake an investigation of your complaint. The Society will not normally investigate complaints about non-members, nor if the complaint was not directed to the member in the first instance. All complaints must be in writing



If you have any comments about the Society or the Member, please write to:

The Director General
The Society of Will Writers
Chancery House
Whisby Way
Lincoln
LN6 3LQ

Tel: 01522 68 78 88

The Society of Will Writers hopes that you will be satisfied with the service you receive from the Member, and thanks you for deciding to have your Will(s) prepared by a Member of the Society.

Source: <https://www.willwriters.com/public/client-charter/>

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