



## What to do to Complete the Process

**Now that you have taken the important step of having your Will prepared please follow these simple steps:**

- STEP 1.** READ through your Will carefully and make sure that it reflects your instructions and intentions exactly;
- STEP 2.** CHOOSE to safely store your Will with us for a small amount each year. Please see the enclosed Storage & Update Options (options include unlimited reviews/updates and other services);
- STEP 3.** EXECUTE your Will – sign and get it witnessed in the proper manner. Please refer to the notes on the right for instructions on this;
- STEP 4.** REPEAT the Will execution process on the Signing & Witnessing Confirmation Sheet (if you have not chosen one of our storage options in step 2) so that we may verify that it has been done accurately;
- STEP 5.** INFORM your executors of the location of your Will;
- STEP 6.** COMPLETE the Referral/Testimonial Sheet if you wish any of your family, friends and work colleagues to also benefit from our service; and
- STEP 7.** RETURN your documents to us in the pre-paid envelope provided using this checklist:

- The completed Signing & Witnessing Confirmation Sheet (if storing the Will yourself);
- The completed Referral/Testimonial Sheet;
- One of the signed Mutual Notices of Severance (if these have been included with your documents) so that we may verify that these have been signed;

Additionally, if you are returning your Wills/Trusts for storage then include:

- your signed and witnessed Will(s) (and Trust documents if any);
- Executor Letter(s);
- any Letters of Wishes you wish to keep with your Will/Trust; and
- the completed Storage & Update Service Document.

**If you have any doubts about the correct way that your Will must be signed and witnessed, you must contact Cornerstone Wills for guidance.**

### Referring us to your Friends and Family:

Our business growth depends on customer satisfaction and our customers recommending us to their family, friends and colleagues. If you feel that you have benefited from our services and the advice we have given then we would warmly welcome you passing details of such family and friends onto us using the Referral Sheet provided; **for every successful referral we are happy to send you a M&S voucher (either £10 or £25 if you sign up for one of our annual storage/update options) as a thank you for taking the time to do this.**



## IMPORTANT NOTES

### Signing and Witnessing:

- a) You **must** have **two** witnesses and you **must** sign and date your Will in the presence of both witnesses together and they must both see you sign. You **must not** sign in the presence of only one witness and get your second witness to sign at a later date;
- b) Both witnesses **must** then also sign in your presence, adding their full name, address, phone number, email and occupation in the space provided;
- c) If you are storing the Will yourself, you and your witnesses **must** also then sign and complete the Signing & Witnessing Confirmation Sheet that **must** be returned to us so that we know you have completed the process and without error;
- d) Your witnesses **must not** be a beneficiary or potential beneficiary of your Will or the spouse/partner of a beneficiary/potential beneficiary;
- e) The witnesses **must** be over 18 years of age, they **must not** be blind and **must** be of sound mind;
- f) In addition to this we recommend that your witnesses are not blood relatives or their spouse/partner. Work colleagues, friends or neighbours are ideal witnesses;
- g) Your witnesses do not need to know the contents of your Will; and
- h) Your witnesses do not need to be legal professionals nor be members of any professional body.

### Caring for your Will:

- a) You will invalidate your Will if you pin, staple, glue or attach anything to this document.
- b) You can manually update only the directory of names and addresses in the back of the Will. Writing on the body of the Will, other than in the process of signing and witnessing the document, will also invalidate this document.