



What to do to Complete the Process

Now that you have taken the important steps of having your Will prepared please follow these simple but important steps regarding the formal documentation:

- STEP 1.** READ through your Will carefully and make sure that it reflects your instructions and intentions exactly as per your approved draft if applicable;
- STEP 2.** EXECUTE your Will – sign and date it and get it witnessed in the proper and legal manner. Please refer to the notes overleaf for instructions on this;
- STEP 3.** SIGN and date all other documentation that may have been sent to you with your Will (including, but not limited to, a Letter of Wishes to your Executors and/or Trustees, a letter to the Land Registry, the SEV Form and the three Mutual Notices of Severance);
- STEP 4.** COMPLETE the Referral/Testimonial Sheet if you wish any of your family, friends and work colleagues to also benefit from our service;
- STEP 5.** CHOOSE to store your documents with Cornerstone Wills in our fireproof safe for a small annual payment. Please see the enclosed Storage & Update Options leaflet; the options include unlimited reviews/updates (where conducted by letter, phone or email) and credit-card sized “proof of storage” cards to give to your executors. Eventually, INFORM your executors of the location of your Will. Your next steps depend on your chosen option;

If you have chosen to store your documents with Cornerstone Wills please follow the next two steps:

- STEP 6.** COMPLETE, sign and date the enclosed Standing Order Mandate;
- STEP 7.** RETURN the following documents to us in the pre-paid envelope:
 - Your dated, signed and witnessed Wills/trusts;
 - Your completed, signed and dated Standing Order Mandate;
 - The completed Referral/Testimonial Sheet; and
 - Any other document requested or required to be stored (including, but not limited to, a Letter of Wishes to your Executors and/or Trustees, a letter to the Land Registry, the SEV Form and the three Mutual Notices of Severance).

If you have chosen to store your documents at home or elsewhere please follow the next two steps:

- STEP 6.** RECORD proof of Will execution. Either take a photograph or scan of each signature page or repeat the Will execution process at STEP 2 with your two witnesses on the Signing and Witnessing Confirmation Sheet;
- STEP 7.** RETURN to us in the pre-paid envelope or by email to the info@ email address below the following documents:
 - Either the photo or scan of each signature page or the Signing and Witnessing Confirmation Sheet;
 - The completed Referral/Testimonial Sheet; and
 - Any other document requested (e.g. the “Office Copy” Mutual Notice of Severance).



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 later;
- 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) Your witnesses **must not** be a beneficiary or potential beneficiary of your Will or the spouse/partner of a beneficiary/potential beneficiary;
- d) The witnesses **must** be over 18 years of age, they **must not** be blind and **must** be of sound mind;
- e) 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;
- f) Your witnesses do not need to know the contents of your Will; and
- g) 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.

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.**

