

# Document Assist Plan



I've made sure my most recent wishes are  
**in my Will** and my loved ones know  
where it is and **how to get hold of it**

## **Your Will**

As one of the most important documents you will ever sign, it is vital your Will is stored safely. A missing or damaged Will can complicate the administration of your estate, and your loved ones will have the unnecessary worry and expense of trying to locate it or giving evidence to the Court to explain the condition of the document.



**Assist  
Law**

**Protecting your world**

## I want to know that my Will is somewhere safe and can be easily found when the time comes

Should I keep my Will at home so my loved ones know where it is and I can check it whenever I like?

No! Although it would be close to hand, storing your original Will at home carries the unnecessary risk of loss or damage and it is vulnerable to being tampered with. Also, the more secure the place you choose to store it at home, the harder it will be for your executors to find when they need it. Whilst a copy is ideal for you to keep at home for reference, when you die the Probate Registry will only accept the original signed Will.

Should I keep my Will with a solicitor?

Solicitors often store your Will for free. This is because they will hope to handle the estate when you die. This will often lead to unnecessary expense as your executors may be able to deal with your affairs themselves and can take advice at the time if necessary. Solicitors are often difficult to locate after many years due to changing the name of the practice and moving premises during your lifetime.

Should I keep my Will with the bank?

Banks provide a storage facility for your Will and there will be a charge for this service. Most charge either an annual or quarterly fee plus an access fee each time you want to retrieve it.

Banks and solicitors are unlikely to offer a retrieval service as standard, meaning that you or your executors would have the inconvenience of arranging collection of the Will at a most difficult time.

Lifetime Secure Will Storage and Retrieval

Your **Document Assist Membership** includes the storage of your Will documents in secure, fire-proof vaults from where they can be easily retrieved when required. Your appointed executors have Will Retrieval Cards so that they know where your Will is and how to obtain it when needed. Our security procedures mean that during your lifetime, only you will be able to access your Will. When the Will is requested, it is delivered directly and securely to you, or your executors upon your death. This ensures that it will always be in safe hands.

## I want to be sure that throughout my lifetime my wishes are kept up to date in my Will when it is needed without having to worry about how much it will cost, or the time it will take

Should I update my Will through my bank or solicitor?

Both banks and solicitors will charge each time you wish to make a change and this can mount up over the years particularly when you consider that it is often changes in other peoples circumstances that cause you to make a change. There may also be a charge each time the Will is accessed for updating and failure to update your Will means your wishes will be out of date and problems may ensue.

Updating your Will

Your **Document Assist Membership** allows you the flexibility to make unlimited updates to your Will, with no additional costs. You can inform us of your changes in whichever way suits you best: via letter, email or over the telephone. We will review your Will and implement the updates, always taking into account all relevant changes in legislation. This means that you can update your Will as frequently as you need to in your lifetime, safe in the knowledge that your Will reflects your most recent wishes.



# Key benefits of your Document Assist Membership

- Will Storage in our state of the art secure document storage facility, which is protected against fire, theft and damage.
- Free Will retrieval which includes a copy Will to keep at home and Will retrieval cards for your Executors to keep for future reference
- A copy of your Will to retain at home for your own records and ease of reference.
- Our security procedures mean that during your lifetime, only you will be able to access your Will.
- When the time comes, your Will can be quickly retrieved and delivered directly and securely to the people you have expressly chosen, ensuring it is always in safe hands.
- Future updates of your Will for the remainder of your lifetime by email, letter or telephone / Unlimited updates, so changes to your Will can be made as and when your life circumstances change
- All the benefits of this service are guaranteed by The Professional Association of Legal Services (PALS)

## We are here to help

With over 50 years experience, Assist Law has been delivering lifetime peace of mind for its customers and their families. If you have a question, would like additional guidance or need some support, we're here when you need us.

You can telephone us on 01934 836159 or email us at [customercare@assistlaw.co.uk](mailto:customercare@assistlaw.co.uk)

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