

UPDATING YOUR WILL BY CODICIL

CLIENT AGREEMENT

Introduction

Thank you for instructing Zedra Trust Company (UK) Limited ("**Zedra**") to assist you with drafting a Codicil to change the Executor (and Trustee if there is a Trust in your Will) of your existing Will.

The purpose of this agreement and the accompanying Terms and Conditions for the Drafting of Codicils is to confirm some important details about how we propose to provide our services. Some of the points, as outlined in this agreement, are professional requirements and others are required by law, but we hope that all of this information will be helpful to you.

The Terms, together with this agreement will amount to a legally binding agreement between you and ZEDRA. Please therefore read them all and if you have any questions or require any further information about the documents, please do not hesitate to contact us.

We specifically draw your attention to clause 4 in the Terms as it affects your rights and the extent to which ZEDRA will be liable to you and your beneficiaries in the future. By signing this agreement you are confirming that you have read and understood the Terms and that we have drawn your attention to them.

The work we will do for you

Following receipt of your current Will we will provide the following Service ("**Service**"): Draft a Codicil to remove your existing Executors and Trustees if there is a Trust in your Will and appoint Zedra Trust Company (UK) Limited as professional Executor (and Trustee if there is a Trust).

Although we will try to obtain from you all information relevant for us to perform the Service, we are not responsible to you or anyone else for incorrect information provided by you to us. We will prepare your Codicil relying on the information given by you. By way of example, if you provide us with a Will that is not your current Will we may draft a Codicil that does not correctly deal with the change of Executors and will therefore be invalid.

The Service does not include any advice on the terms of your Will or the terms of the Codicil. Please let us know if you would like us to extend the Service to include a review of your Will and we can discuss the scope and cost of doing so.

The Service only extends to Wills written under the laws of England and Wales but does not extend to English private international law or the conflict of laws. The Services do not include advice or assessment upon the effect of your English Wills in other legal jurisdictions (including in respect of tax or rights of succession).

We are not responsible for the supervision of the execution of your Codicil. We will provide you with detailed instructions upon how to validly execute the document, but our services do not extend to overseeing such execution. Nor are we responsible for the verification of the execution of your Codicil unless the original document or a copy is sent back to us.

We are not responsible for the future review of your Will or any subsequent Codicils. Any changes in your personal circumstances, or the circumstances of anyone named in your Will, or any change in the law (including taxation legislation) should be considered by you and we are not obliged to contact you in these circumstances.

Identifying you

As a result of government controls on money laundering we are required to identify every client that we act for. Our usual practice will be to commission an electronic database search. Otherwise we might ask to see your original passport or photo driving licence and a recent utility bill or bank statement.

How much we will charge

ZEDRA will waive its usual charges for this Service.

Your right to terminate

Under the Consumer Contracts Regulations 2013 you have the legal right to cancel this Agreement without providing a reason for the decision or incurring any liability within the 14 calendar days from the date on which you enter into the Agreement. By signing the Letter of Engagement you give express consent for us to commence work on your Codicil before the end of the 14 day cancellation period. You acknowledge that by providing this consent you will lose the right to cancel the contract under the Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013. Subject to the above, you have the right to terminate our services in accordance with the Terms.

Complaints

We have a complaints procedure details of which can be found in the Terms. Any complaints should be addressed to the person overseeing the work we are doing for you.

Joint clients

If there are more than one of you who have instructed us, we need to identify each of you as noted above. We must also explain that by acting for both of you, there is no duty to keep information that either one of you has provided to us confidential from the other joint client. This means that information which either one of you gives to us must be capable of being disclosed to the other. If one of you supplies information but does not wish us to share it with the other joint client and it would be material to their involvement in this matter we may have to stop acting for one or other or quite possibly both of you.

Marketing

We, or other companies within the Zedra Group, may from time to time contact you by in writing, by email, or by phone about other products and services that we think you might be interested in. Where we do this we may use your name, contact details and any preferences you have let us know about. Your consent is optional and not required to access our free Codicil services. You may withdraw your consent at any time by clicking the unsubscribe link in our messages, by contacting us at dataprotection@zedra.com, by telephoning 01565 748808 or by writing to your usual contact at Booths Hall, Booths Park 3, Chelford Road, Knutsford, Cheshire, WA16 8GS. We process your personal data in accordance with our Privacy Notice which can be found on our website, at: www.zedra.com/legal-privacy-notice.

If you require any further information, have any queries or need advice on any aspect of the above matter, please do not hesitate to contact us. In order that we can be sure that there are no misunderstandings between us as to what we are doing for you and on what terms.

I/We have read the above and the standard terms and conditions of business of Zedra Trust Company (UK) Limited and I/we agree to instruct Zedra Trust Company (UK) Limited on the terms and conditions set out in them.

I/we agree to receive marketing communications from ZEDRA and/or other members of the Zedra Group as described in this agreement.

Signed

Signed

Name of client

Name of client

Date

Date

Please complete

Full Name

Residential Address incl Post Code

Date(s) of Birth

Date(s) of latest Will,
a copy of which is attached

Zedra Trust Company (UK) Limited

Authorised Signatory

Date