

**WILLWRITING QUESTIONNAIRE
TO BE ANSWERED BY FIRMS THAT UNDERTAKE ESTATE PLANNING**

1 Please detail below an approximate split of your activities:

Will Writing	%
Codicils	%
Advance Directives	%
Joint Tenancies	%
Trusts Establishment	%
Inheritance Tax	%
Power of Attorney	%
Probate	%
Pre-paid Funeral Plans	%
Will Storage	%
Any Other Work (please provide details)	%

2 Please list the numbers of:

Instruction Takers:

Consultants:

Sub-contractors:

Agents:

Self-employed Persons:

Will Drafters:

3a) What training, if any, is given to staff, consultants, sub-contractors and self-employed persons, particularly in respect of instruction taking?

b) Please also confirm those undertaking such training are required to sign documentation confirming that they have fully understood the training given **YES/NO**

4a) Do you have a formal written set of guidelines in place? **YES/NO**

b) What measures exist to ensure compliance with these guidelines?

c) Does every individual, operating on your behalf, have access to the guidelines and are all updates and amendments communicated effectively to everyone? **YES/NO**

If yes, please provide details of how this is undertaken and when the last update was communicated.

d) How regularly is this done?

e) Do you use proprietary software/ forms or those recommended or provided by a recognised Professional body? **YES/NO**

If no, please explain

5 Are audits undertaken, on a regular basis, of those operating on your behalf? **YES/NO**

If yes, how often do you perform such an audit and review files?

Are independent checks made, by senior staff, of those operating on your behalf?
If yes, please provide details

6 Do you ensure that all wills that you store are kept in fireproof storage **YES/NO**

If no, please give full details

Signed:

Dated: