

PM House
250 Shepcote Lane
Sheffield
S9 1TP
Tel: 0300 333 0303
Fax: 0114 2493439
enquiry@unionline.co.uk

Dear Member

Re: Your Will

Thank you for contacting UnionLine in relation to the drafting of your Will.

A member of our Wills and Probate team has already been allocated to you and will be responsible for preparing your Will. The solicitor with overall responsibility and supervision of your case is Matthew Cordall.

Along with your completed Will Questionnaire, we will require **two** forms of identification so that we can proceed to draft your Will on your behalf. This should take the form of copies of the documents as detailed in the information sheet entitled "Checking Your Identity" below, or within the online form "Identity Check" if this included in your unique forms web link. If you cannot upload documents in the online form, please do not post the original documents to us, just copies.

We must advise that we are unable to undertake any work on your Will until such time as we have received two valid forms of identification from you.

Please bear in mind that the Will provided is a "simple Will" and should you therefore have requirements that are not catered for within the questionnaire you should contact us immediately and we can discuss this further with you.

Please read the Terms and Conditions below which provides important information with which you should familiarise yourself.

As may have already been mentioned to you, on the finalisation of your will we can store the same for you at our offsite storage facility. If you have not already done so, please confirm whether you would like to take advantage of this service.

We look forward to receiving your completed online questionnaire, however if you have any questions please do not hesitate to contact your file handler directly

Yours sincerely

UnionLine
0300 333 0303 (option 3)
Wills@unionline.co.uk

STANDARD TERMS AND CONDITIONS OF SERVICE – SIMPLE WILL SERVICE

Our retainer with you - This document contains important information and forms the basis of our retainer with you. Should you have any questions regarding the content then please contact us immediately.

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| What you have instructed us to do for you | You have instructed us to prepare a simple Will in line with the membership benefits you enjoy through your union. Should the contents of the Will prove to be complex you will be referred to a Panel Firm who may charge for the service. Provision of this service is subject to rule. |
| What we will not do for you | We will not act for you if you fail to meet your obligations below or ask us to act in an unprofessional or improper manner, abuse our staff or ask us to mislead a third party. |
| What you must do | You must provide us with timely and accurate instructions at all times. You must not mislead us or ask us to mislead any other party. In order to benefit from the free simple will service you must also remain at all times a member of your union. You must also pay the correct level of subscription charges due to your union in accordance with your membership terms and conditions. Should you fail to pay your membership fees or terminate your membership we will no longer be able to act for you under this agreement. |
| The authority you give us | By instructing us you are authorising us to act in your best interests. In order to ensure we maintain our high service levels we may also share your details with our associated companies who provide legal and business support services to us. This can include outsourced legal services, information technology services, auditing, accounting services, post room services, storing and archiving of claims. Where it is necessary for a third party to have access to your file it will be under the same basis of confidentiality as we hold your papers. By instructing us you agree to this sharing of information. |
| Complaints | <p>We are committed to providing high quality legal advice and client care. However, if you feel that you have not received an acceptable level of service we want you to tell us as we regard it as an opportunity to monitor and improve our service.</p> <p>If you are unhappy about any aspect of the service you have received, please contact UnionLine by telephone, by post, or by email to complaints@unionline.co.uk. We have a procedure in place which details how we handle complaints which is available from any member of staff and on our website.</p> <p>We have up to 8 weeks to consider your complaint and, if we have not resolved it within this time, you may complain to the Legal Ombudsman (LeO). LeO expects complaints to be made to them within 6 years of you realising there was a concern and within 6 months of your last contact with us. LeO will usually only consider a complaint if our internal complaints procedure has been exhausted and there are certain circumstances where LeO is not able to consider complaints, such as from some organisations. If you require further information you should contact LeO direct.</p> <p>LeO's contact details are as follows: Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ Telephone: 0300 555 0333 Minicom: 0300 555 1777 Email: enquiries@legalombudsman.org.uk Website: www.legalombudsman.org.uk</p> <p>Under EU legislation we are also required to provide you with details of an organisation which offers Alternative Dispute Resolution (ADR). That organisation is ProMediate, and their contact details are: Telephone: 07824 704826 mobile 01928732455 work Email: enquiries@promediate.co.uk http://www.promediate.co.uk/</p> <p>However, it is for both parties to agree to use ADR and as you have access to the Legal Ombudsman this firm does not use the ADR process.</p> |
| Regulation | We and all our outsourced or sub-contracted panel firm partners are authorised and regulated by the Solicitors Regulation Authority of England and Wales or by the Law Society of Scotland for our Scotland sub-contracted law firms. Our SRA registration number is 608309. |
| Professional Indemnity Insurance (PII) | In accordance with the requirements of the Provision of Services Regulations 2009, we maintain qualifying Professional Indemnity Insurance, details of which can be provided on request. |
| Identity Check | We are required to check your identity in accordance with the Money Laundering Regulations 2007. In order to confirm your identity we will perform an identity check using our online system CRIF. The search |

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| | <p>uses consented data only and will therefore not leave a footprint on your credit profile and will therefore not affect your credit rating.</p> <p>Not every instance of your credit report being checked will result in a visible 'footprint' being left on your report. There is such a thing as a 'soft credit search' or a 'soft credit check', which is recorded in your credit history, but is not visible to other lenders. This includes the identity check undertaken by us.</p> <p>Identity checks, quotations and other types of soft search are recorded on your credit report so that there is a transparent record of who has been viewing your credit history, but do not affect your creditworthiness.</p> <p>If you require details of the search carried out against you can contact Equifax by writing to: Equifax Ltd Customer Service Centre PO Box 10036 Leicester LE3 4FS</p> |
| Storage of documents | <p>Following the finalization of your Will, if you wish, we will keep it in secure off site storage for as long as is needed and will not charge to send the Will to you or your Executors when requested. We will keep your file of general papers in relation to your Will in storage for a period of 6 years. After this time we will send your papers to be destroyed unless you specifically state that you wish the same to be returned to you. We will not charge you for storing your file of papers and we will recover the same from storage in the event you require some documentation from the same. To clarify your final Will will be retained until such a time that it requested by you or your Executor, or you inform us that you no longer wish for us to retain your Will, and only your file of papers will be destroyed.</p> |

Checking your Identity

We are required to check your identity in accordance with the Money Laundering Regulations 2007.

Please note that we cannot carry out work on your behalf unless we have complied with the Regulations.

Please send us a **COPY** of one document from each of the following lists. We require two pieces of Identification therefore you cannot use the same document for Proof of Name and for Proof of Address. Please note that if there is more than one of you then identification is required for all parties.

LIST A Proof of name Please send an copy of **one** of the following:-

- current signed passport
- cheque drawn on an account in your name with a bank in the UK or any other EEA member state
- residence permit issued by Home Office to EEA nationals on sight of own country passport
- current UK or EEA photo-card driving licence
- current full UK driving licence
- Bank statement detailing your account number and sort code

LIST B Proof of address Please send a copy of **one** of the following:-

- a utility bill no more than three months old or a statement or certificate from a utilities supplier confirming an arrangement to pay for services on pre-payment terms
- council tax bill for current year
- current full UK driving licence
- bank, building society or credit union statement or passbook containing current address
- a recent original mortgage statement from a recognised lender
- solicitor's letter confirming recent house purchase or land registry confirmation of address
- local council or housing association rent card or tenancy agreement
- benefit book or original notification letter from the Benefits Agency confirming the right to benefits
- EEA member state identity card
- Revenue and Customs self-assessment statement or tax demand
- house or motor insurance certificate