■ **www.balanceconsultancy.co.uk**

■ **EMAIL** info@balanceconsultancy.co.uk
■ **EMAIL** shandip@balanceconsultancy.co.uk

■ **CALL** 0203 837 0099
■ **CALL** 07780 690432

Where should I store my will?

A will is a valuable legal document that needs to be kept safe and in good condition to safeguard your wishes. Most people make a will to have peace of mind and provide certainty for loved ones so making sure your document is secure is essential.

Key Facts

To issue a grant of probate, the probate registry requires your signed original will.

If you make your will and keep it in your possession, if the original document is not found at the time of your death, the legal presumption is that you have intentionally destroyed or disposed of it to revoke your will.

If your executors have a photocopy of the will, they will need to apply to the probate registry and provide evidence as to what has happened to the original will. This is likely to delay the administration of your estate and incur additional costs to prepare legal statements and liaise with the probate registry.

Similarly, if a will appears to have been altered, damaged or marked, the executors will need to provide additional information to the probate registry. The validity of the entire will or specific gifts may be affected.

If no original will or copy is accepted by the probate registry, the intestacy rules will apply or the terms of a previous will applied in error. *The opposite outcome of what you wanted to do by making your will.*

BALANCE CONSULTANCY

Talk to us about what matters to you.

–

■ **CALL TODAY**
0203 837 0099 / 07780 690432

–

■ **EMAIL**
info@balanceconsultancy.co.uk
shandip@balanceconsultancy.co.uk

–

■ **BOOK**
Book a Home Visit / Zoom meeting.
www.balanceconsultancy.co.uk

Where should I store my will?

When a will is stored at home, there is an increased risk of loss, theft or damage. If your will gets into the wrong hands, it could be disposed of without your knowledge.

As a customer of Balance Consultancy, we offer free secure document storage for your will and other documents that we prepare for you.

Your documents are kept securely with fire and water-resistant measures in place to minimise the risk of theft, loss or damage.

Your will is safe from getting into the wrong hands or simply getting lost at home.

We keep scanned copies and careful records of all documents held in storage and give you a copy with confirmation of storage.

We also make an entry on the National Wills Register to minimise the risk of an earlier will being administered.

Storage Service FAQs

What documents can I store?
Wills, letters of wishes, trust documents and lasting power of attorney documents prepared by our company or partners. We cannot store your house deeds.

What happens if I want to make a new will?
We keep your current will in storage until a new one is signed and stored. We will then return your revoked will to you so that you can dispose of this.

What do my executors need to do to retrieve my will?
Your executors need to provide us an original death certificate and proof of identity.

We will arrange with the executor(s) a time to collect the will from our office. We can also give them some guidance on next steps and a quote for any additional services they may need.

If all acting executors are unable to be present to collect your will, we will seek the permission of the non-attending executors to hand over the will to a single executor or post via special delivery (postage fees apply) to a confirmed address.

What if I want to take my will out of storage?
You are free to do this at any time. We will ask you to provide ID and collect personally from our office. If you are unable to attend in person, we will post this to your confirmed address via special delivery (postage fees apply). We do not charge a retrieval fee.

What happens if Balance Consultancy is no longer in business?
If in future, we sell to another business, we will notify you of any new owners. You will have the option to retrieve your will if you prefer or keep it securely stored.

If the business is dissolved, we will notify you to arrange for your will and other documents to be returned to you.

It is essential that you keep your address and contact details up to date so we can get in touch with you if needed.

BALANCE CONSULTANCY **www.balanceconsultancy.co.uk**

- **EMAIL** info@balanceconsultancy.co.uk
- **EMAIL** shandip@balanceconsultancy.co.uk
- **CALL** 0203 837 0099
- **CALL** 07780 690432
- **BOOK** A Home Visit / Zoom meeting