



Storage of Documents Guide

“What happens to my Will once I have signed it?”

“I can store my Will safely at home with my other documents”

“I have a safety deposit box at my local bank”

Where should you store your Will and other related documents?

Once you have signed and had your Will witnessed you need to consider where it is to be kept.

A Will is a very important document and must be readily available to your Executors when they need it. You can of course choose to keep it wherever you want but careful consideration should be given as to where. It needs to be kept safe to ensure that it does not get lost or damaged which can happen. If your Executors cannot find it your wishes may not be followed.

1. Storing your Will at home (not recommended)

Although your home provides a convenient place to store your Will there are several risks which should be considered:

- It could get lost in a house move
- It could get destroyed in a fire
- It could be damaged in a flood
- It could get damp
- It could fall into the wrong hands*

* Consider the importance of your wishes if you have excluded someone in your Will and they find it after your death and destroy it. Without your Will your estate would be divided according to the rules of Intestacy and may go to those you are trying to exclude. Under such circumstances, it would not be wise to keep the Will at home.

2. Storing your Will with a solicitor or at the bank (not recommended)

Solicitors often store Wills they write for free on the opportunity to sell their probate service to your Executors (if they are not already appointed as Executors in your Will) for a fixed fee or percentage of your entire estate which could be expensive.

Banks would require to see the grant of probate before releasing contents stored in a safety deposit box. The Will would be required in order to obtain the grant of probate so it should never be kept in a deposit box under any circumstances.

3. Why Store your documents with Duncan Turner Associates?

We offer a secure and convenient way to store your Will, Lasting Powers of Attorney and any accompanying documents (if relevant) for a single lifetime fee.

There are many benefits with our storage facility:

- We provide you with a unique storage identification number to make retrieval easy
- Your Will cannot be tampered with during storage
- We make a scanned copy of your Will
- The contents of your Will remains confidential (even to beneficiaries)
- Only you and your trusted Executors or Attorneys can retrieve your documents
- A grant of probate will not be needed to release the documents
- There is no charge on your estate for probate work
- Free advice can be given to your Executors about the probate process if needed

We write to your Executors informing them where your Will documents are kept and let them know your storage number for easy retrieval. ID will be required before we can release any documents to you or your Executors.

**If you would like to discuss our storage facility,
please contact Tim Turner on
0330 311 0910 or 07827 453 062**

timturner@duncanturnerassociates.com

Duncan Turner Associates Limited is a member of the Institute of Professional Willwriters and complies with their Code of Practice approved by the Chartered Trading Standards Institute.

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