


Client agreement

1. [YFS Legal] have agreed to give you legal advice and draft the below documents for you;
 - a. Will; and/or
 - b. Enduring power of attorney

Cross out what doesn't apply

2. We will not charge you to do your will and/or enduring power of attorney.
3. [YFS Legal] will only help with simple wills – no complex estates.
4. Any extra fees or costs will be your responsibility, for example if you need transport to get to a will clinic.
5. The information you tell us is confidential. We will not share that information with anyone unless we have to by law or if you tell us we can share that information.
6. We will take a copy of your documents, including instructions and completed will and enduring power of attorney, and may destroy that after 7 years. Your record will be held electronically.
7. We will not keep the original copy it is your responsibility to keep it in a safe place and it is recommended that you tell the executors about where your will is.
8. We will go through what you want done and the lawyer will complete your will. It is important that you tell us if you do not understand the document or if it is not what you would like.
9. It is important that you tell us all information so that we can provide you accurate legal advice.
10. We can no longer help you with your will and/or enduring power of attorney if:
 - a. There is conflict of interest between your interests and another client
 - b. We can no longer contact you
 - c. You do not give us instructions to act
 - d. You unreasonably refuse to follow our advice
 - e. You lose confidence in our service.



11. To make a will or enduring power of attorney, you need to have ‘testamentary capacity’ otherwise we cannot help you make the documents. That is, that you understand what the document is and can tell us what you want to do.

12. We will not act as executors or help administer your estate.

13. We base our instructions on what you tell us about your estate, it is important you give us the right information.

14. We will not ask to see your financial documents, so it is important that you give us accurate information. If you do not that might affect your will.

I agree to the terms above

Client _____ date _____

Witness _____ date _____