



Willwriting Academy Limited

Trinity Point – New Road – Halesowen – B63 3HY

Telephone: **08456 444261**

Email: **courses@willwriting-academy.org.uk**

Company limited by guarantee

Company Registration: 6795501

www.willwriting-academy.org.uk

Taking Will Instructions

A 2-day Course

Tuesday & Wednesday 16th and 17th March 2010

Nettle Hill Training & Conference Centre, Ansty, Coventry, CV7 9JL

Led by Heather Pierson,
the course is aimed at Willwriters who take
instructions but do not draft Wills.

The course covers basic Wills, the instruction taking process,
advising clients and marketing your services to
maximise earnings potential.

Course Contents:

- 1) What is a Will**
- 2) Intestacy**
- 3) Capacity to make a Will and how to test for Capacity**
- 4) Appointment of Executors**
- 5) Inheritance (Provision for Family and Dependents) Act 1975**
- 6) Disposal of estate – specific items, legacies & residue**
- 7) Trustees' Powers**
- 8) Attestation and execution including witnesses' responsibilities**
- 9) Duty of Care to client and beneficiaries**
- 10) Practical instruction taking**

followed by an examination
and role-play

Course Fee - £275 pp

Includes Course Manual:

A Basic Guide to Taking Will Instructions by Jane Barlow

Refreshments & Buffet Lunch

B&B accommodation at Nettle Hill available @ £45.00 pp pn



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Taking Will Instructions – Coventry

Tuesday and Wednesday– 16 & 17 March 2010

Nettle Hill Conference & Training Centre, Ansty, Coventry, CV7 9JL
Booking Form

Mr/Mrs/Miss/Ms* First Name..... Surname.....

Company (if applicable).....

Address.....

..... Postcode.....

Telephone..... Fax.....

Mobile: Email.....

Please reserve ____ place(s) on the Taking Will Instructions Course £
on 16 & 17 March 2010 @ £275 per person
(inclusive of course manual & refreshments and lunches) _____

Please reserve ____ B&B accommodation for the night of Mon 15 March 2010
@ £45.00 pp pn _____

Please reserve ____ B&B accommodation for the night of Tues 16 March 2010
@ £45.00 pp pn _____

Total _____

Please advise of any special dietary requirements/preferences:

.....

Signed:..... Date:.....

Please return this form along with payment in full **by Friday 5 March 2010**

Please make your cheques payable to 'Willwriting Academy Ltd' and send to:
Willwriting Academy Ltd, Trinity Point, New Road, Halesowen, West Midlands, B63 3HY
or pay by credit/debit card by calling 08456 442042 or by booking through the Willwriting Academy
website: www.willwriting-academy.org.uk

Willwriting Academy Cancellation Policy: For bookings cancelled more than 14 days before the event, a full refund less £25.00 administration fee will be given. No refunds will otherwise be made.