

**Client Contract**

**Plus a*uthority to start work on your Matter.***

**Reference: [CASE\_REF] Date: [TODAY1]**

1. The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 gives you the right to cancel this contract within 14 days from the invoice due date (Cooling-off Period).
2. The process of gathering the information required, plus one first draft document, your address book, and any queries you may have, is free of charge during these 14 days.
3. If Rugby Wills Ltd. starts work at the beginning of the cooling-off period following payment, you forfeit your right to cancel. Any refunds offered during the cooling-off period will be based on the paid amount less any billable work carried out at your request (other than items in 2 above), plus a cancellation fee of 10% of the total invoice paid.
4. Rugby Wills Ltd requires ***full payment to start work***. A quotation will be provided after our meeting. If acceptable, an Invoice will be sent for payment by return. Upon payment, a receipt will be issued within 24 hours. Work will start following payment and you will be updated on the progress of your matters via email notifications.
5. Rugby Wills cannot accurately provide their services without full disclosure of all your essential information (to the best of your knowledge). Please ensure you respond to our queries and requests in a timely manner and let us know if you’re unsure if any information you hold is essential.
6. Rugby Wills Ltd. communicates primarily via email (chris@rugbywills.co.uk) and phone calls plus SMS. These will be from **07393 302111**. If you wish to opt out of phone calls or texts, please choose here.

No Calls [ ]  No SMS [ ] **. We contact via email as a default.**

1. All files will be emailedto you in PDF (Acrobat), DOX (Word), RTF (Word) or XLS (Excel) format for approval. Please let us know if you cannot access these types of files.
2. You can cancel the contract within the cancellation period by email or letter, and all funds will be returned to your nominated account without question, ***provided*** we haven’t worked on your file. The contract will be deemed cancelled when you have received confirmation from us within 24 hours. If you are in any doubt, please call us.
3. Clients are asked to review all documents for accuracy. We ask you to electronically sign them only when you are fully satisfied that they meet your needs and are accurate. Once signed, inaccuracies or changes picked up later are chargeable. We carry out checks for spelling and typing errors, plus proofreading all documents, but only clients know their information.
4. Rugby Wills prepares an Estate Plan that includes recommendations for products to achieve your specified goals. If you decide to reject any product(s), please inform us immediately, as the details of certain aspects of the plan may not be fully understood. We are happy to provide further explanations for those areas. If you still choose to decline a specific section, we will need a signed disclaimer to protect us against any future claims from beneficiaries, which is also required by our insurers.
5. Rugby Wills has a “Fair Use” policy for limiting document amendments. If a client keeps changing their instructions, this becomes chargeable. We will let you know if this limit is being reached.

[ ]  **I have read and understood the above. I wish to instruct Rugby Wills to start work on this matter immediately**

[ ]  **I will make payment after 14 days to enjoy the cancellation period.**

By signing this contract, you are agreeing to the Rugby Wills Ltd. Terms and Conditions laid out above E&OE.

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| **Signed by**: | **Dated:** |
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Amended 28th November 2024CB **Larger print is available on request.**