

Section 6: **Payment** - You can set up your direct debit using the options below.

You can either provide us with your email address and we will send you a direct debit mandate, or you can go to the provided link to set up the direct debit yourself. Please tick the method you will use.

☐

Email:

☐

Link:

https://xero.gocardless.com/pay/co/GEN3097707062

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit GoCardless Ltd will notify you 3 working days in advance of your account being debited or as otherwise agreed. If you request GoCardless Ltd to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by GoCardless Ltd or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when GoCardless Ltd asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Section 7: **Your Declaration** - You must sign below to confirm the storage plan.

I wish to store my documents with The Society of Will Writers (Services) Ltd. T/A The National Will Archive and hereby confirm that the information provided herein is accurate, correct and complete and that the documents submitted along with this application form are genuine.

I accept that the specified annual payments must be made for the continued storage of my documents.

I understand that I should read the terms and conditions provided by The National Will Archive.

By signing below you accept the storage terms and conditions.

Your right to cancel
You may cancel within 30 days of receipt of your certificate of safe storage. Should you wish to cancel you must do so in writing by either post or email using the contact details found at the bottom of this form. When cancelling you will be liable for the cost of any documents to be returned.

How my information will be used
We take your privacy seriously. We will only use your personal information in the following ways:

Your contact details as provided will be stored on our database along with a unique reference number which is needed for the retrieval of any documents in the future. Documents are checked for validity on arrival and scanned copies of your documents will also be stored on our servers and backed-up off-site. The location of your Last Will and Testament will be registered with Certainty the National Will Register.

If you would like more information about how we use personal data and any 3rd parties we work with please request a copy of our privacy policy or visit our website:
www.thenationalwillarchive.co.uk.

Your signature

(Testator 1)

Date

Your signature

(Testator 2)

Date

Secure Document Storage
Custody Registration Form

(Please complete each section below in BLOCK CAPITALS using a black or blue ball-point pen).



FOR INTERNAL
USE ONLY

Registration Number:

Date Registered:

Section 1: **Your details** - Who are the documents for?

Testator 1:

Title:

Forename(s):

Surname:

Address:

Postcode:

Date of Birth (DD/MM/YYYY):

Telephone No.:

Email:

Testator 2:

Title:

Forename(s):

Surname:

Address:

Postcode:

Date of Birth (DD/MM/YYYY):

Telephone No.:

Email:

Section 2: **Your executors** - Who is appointed in the Will?

Company (if professional executor):

Address:
Postcode:

Telephone No.:

Email:

Executor 1:

Title: Forename(s):

Surname:

Address:
Postcode:

Telephone No.:

Email:

Executor 2:

Title: Forename(s):

Surname:

Address:
Postcode:

Telephone No.:

Email:

Section 3: **Your documents** - Specify documents enclosed.

- | | |
|---|---|
| <input type="checkbox"/> Last Will & Testament | <input type="checkbox"/> Family Provision Claimant Form |
| <input type="checkbox"/> LPA/EPA* | <input type="checkbox"/> Foreign Wills |
| <input type="checkbox"/> Advance Directive | <input type="checkbox"/> Insurance Details/Policy |
| <input type="checkbox"/> Tenancy Severance Deed | <input type="checkbox"/> Land registry |
| <input type="checkbox"/> Asset Protection Trust | <input type="checkbox"/> Letters to Children/Trustees/Executors |
| <input type="checkbox"/> Codicil | <input type="checkbox"/> Minutes of Meeting |
| <input type="checkbox"/> Declaration of Trust | <input type="checkbox"/> Trust Documents |
| <input type="checkbox"/> Exclusion Letter | <input type="checkbox"/> Property Deeds |
| <input type="checkbox"/> Expression/Memo/Letter of Wishes | <input type="checkbox"/> Sealed Envelopes |

*Delete where applicable

Other Documents:

Section 4: **SWW Member Details** - Your Will Writer should fill out this section.

SWW Membership ID:

VAT Registered?: Yes ☐ No ☐

Note to SWW Member: Please ensure you keep The National Will Archive up to date with your bank and contact details.

Section 5: **Returning the form** - Send this form with your documents to us.

Upon completion of this form, including the signed declaration overleaf, please send it to us with the documents you are submitting for storage. Once payment has been arranged and your documents have been placed into storage, your certificate and executor retrieval cards will be issued and sent via post to the address you have provided.

Our address:
The National Will Archive, Unit 2, Blackwood Court, Teal Park, Lincoln, LN6 3AE.