



WHAT IS THE STEP CODE FOR WILL PREPARATION IN ENGLAND & WALES (THE CODE)?

The Code comprises a set of principles that are in place to benefit you. These principles openly demonstrate the standard of transparency and service you can expect from a STEP member preparing your will.

The Code is not exhaustive, but it does provide you with a list of considerations that your will drafter should factor-in during the process.

HOW DOES THE CODE BENEFIT YOU?

The Code outlines a set of standards that are required of the STEP member preparing your will. STEP members are expected to demonstrate the following:

Openness and transparency

- They must remain open with you regarding their qualifications, cost implications when using their services and tax implications of your will, and provide you with a draft to approve before your will is executed.
- They are obliged to take steps to ensure you are not the victim of any fraud by confirming your identity before drafting a will for your estate.
- They must have no doubt in your mental capacity to make an informed decision and must not take any action that could cause a negative outcome for you should they believe you have a diminished mental capacity.
- They should hold an appropriate level of professional indemnity insurance.

Integrity

- A will drafter is required to work with sensitive personal information when preparing your will. The STEP Code sets clear boundaries on how a member must handle this information to best protect you: they must not share your information with other parties without your permission and must meet a series of requirements surrounding the storage of your confidential information.

- They may not benefit from the terms of your will and are expected to decline drafting your will and arrange for a qualified practitioner to assist where there is any conflict of interest.
- They may not refuse to prepare your will based on your age, disability, gender reassignment, marriage/civil partnership, pregnancy/maternity, race, religion or belief, sex or sexual orientation.

Competency

- They must have a sound knowledge of the main areas of law relating to wills.
- They must give you advice that is compliant with the law and taxation regulations and advise on how to avoid risk associated with your will.
- They must manage your requests for meetings, new wills, your queries and final execution of your will promptly.

HOW DOES THE CODE APPLY TO A STEP MEMBER PREPARING MY WILL?

The Code applies to all members of STEP in England & Wales who prepare wills for clients. If your will drafter is a STEP member, you can trust that their work will be in accordance with the Code.

COMPLAINTS

If you feel your will drafter is not acting in accordance with the Code, you can contact STEP to make a complaint. All complaints are taken seriously and will be investigated and dealt with according to STEP's disciplinary processes.

You can download a formal complaint form at www.step.org/professional-standards or call **020 7340 0500** and request a form be sent to you.

The STEP Code for Will Preparation in England & Wales is available to download in full at www.step.org/will-code
For further information on the Code and on the importance of making a will, visit www.step.org/for-the-public where you can find a short video, explanatory leaflets and a find-a-member search facility.