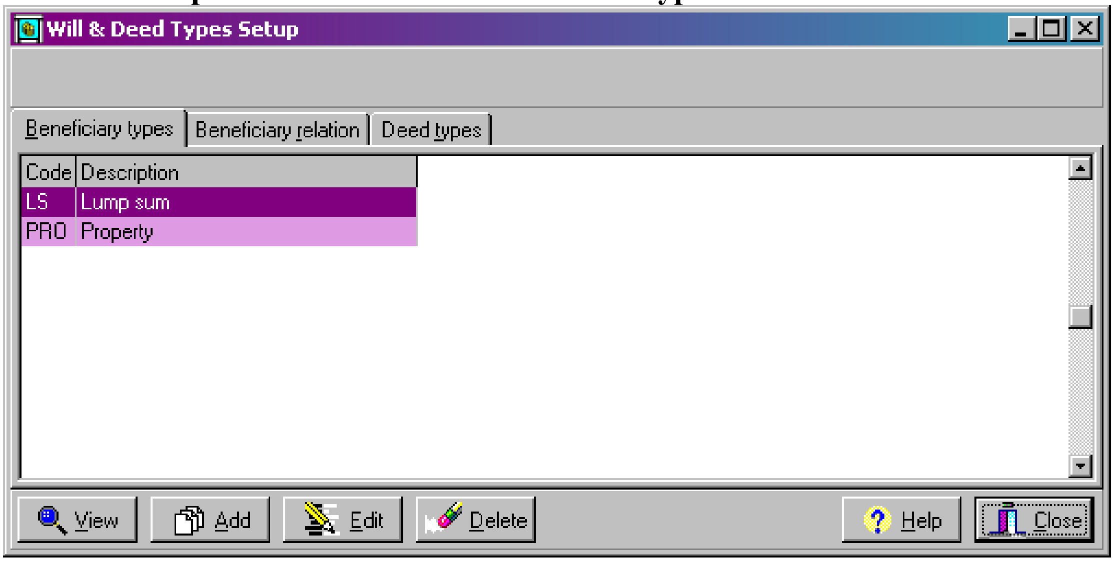
Using the Wills and Deeds module

The Wills and Deeds module allows you to store information related to Wills and Deeds against a client.

Setting up Wills and Deeds types

Go to the **Setup** menu and select **Will and Deeds types:**



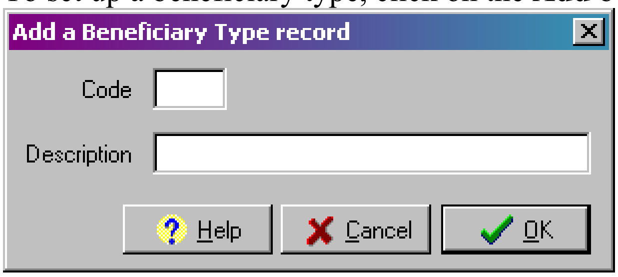
This screen will allow you to setup:

- Beneficiary types
- Beneficiary relations
- Deed types

These will then be available for selection when you add wills and deeds to the client record.

Adding a beneficiary type

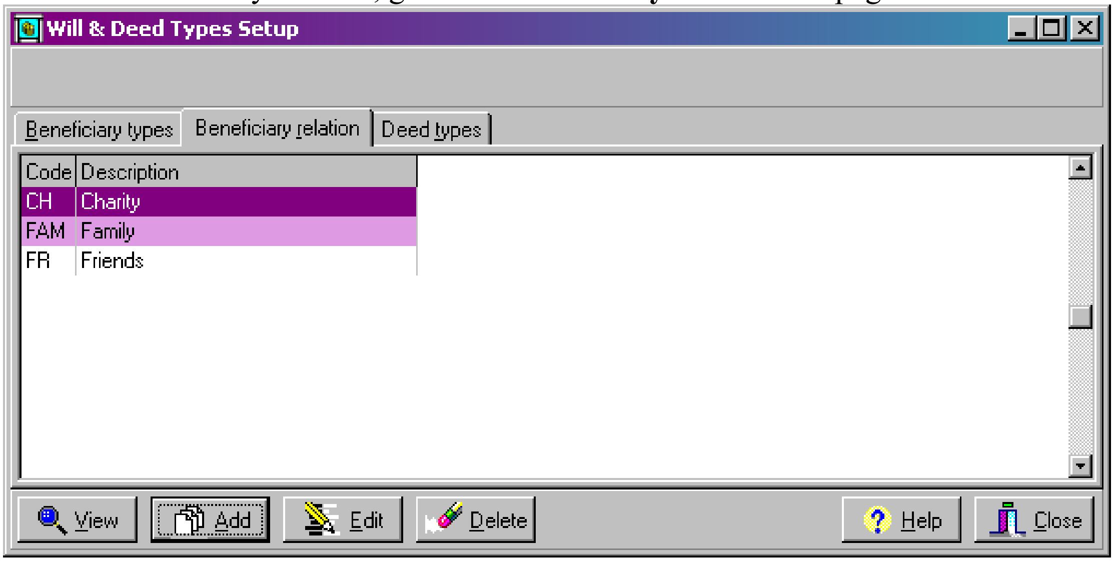
To set up a beneficiary type, click on the **Add** button:



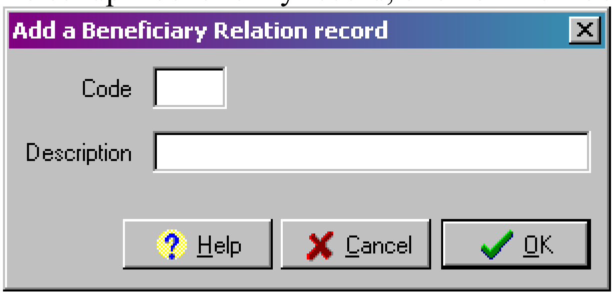
Enter a code and description and click on the **OK** button.

Adding a beneficiary relation

To add a beneficiary relation, go to the **Beneficiary relation** tab page:



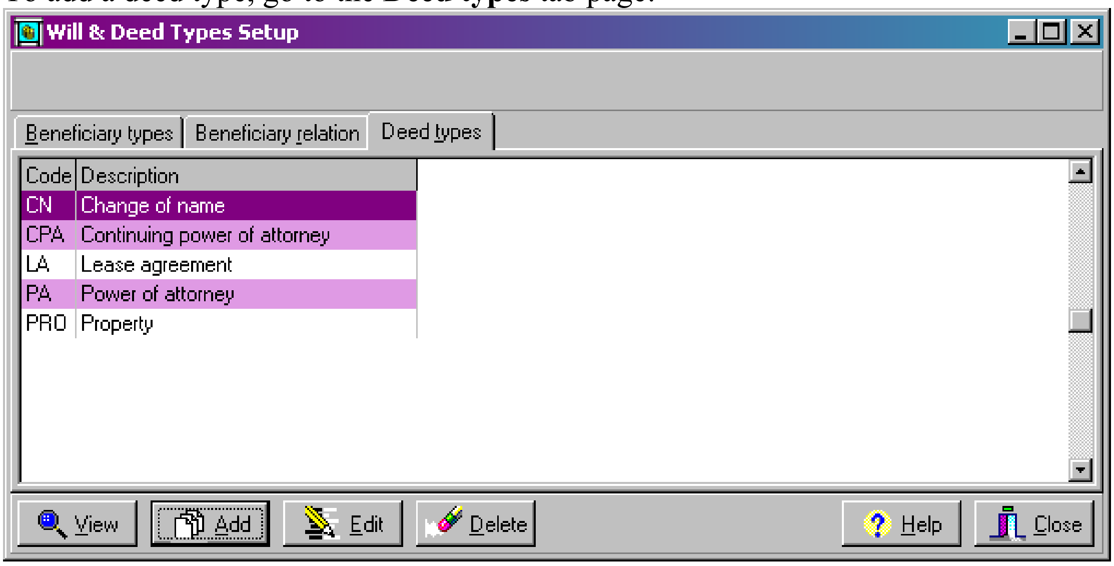
To set up a beneficiary record, click on the **Add** button:



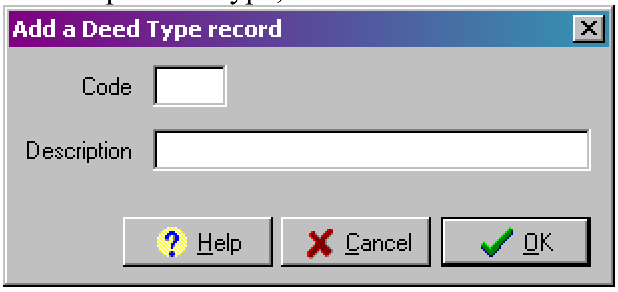
Enter a code and description and click on the **OK** button.

Adding a deed type

To add a deed type, go to the **Deed types** tab page:



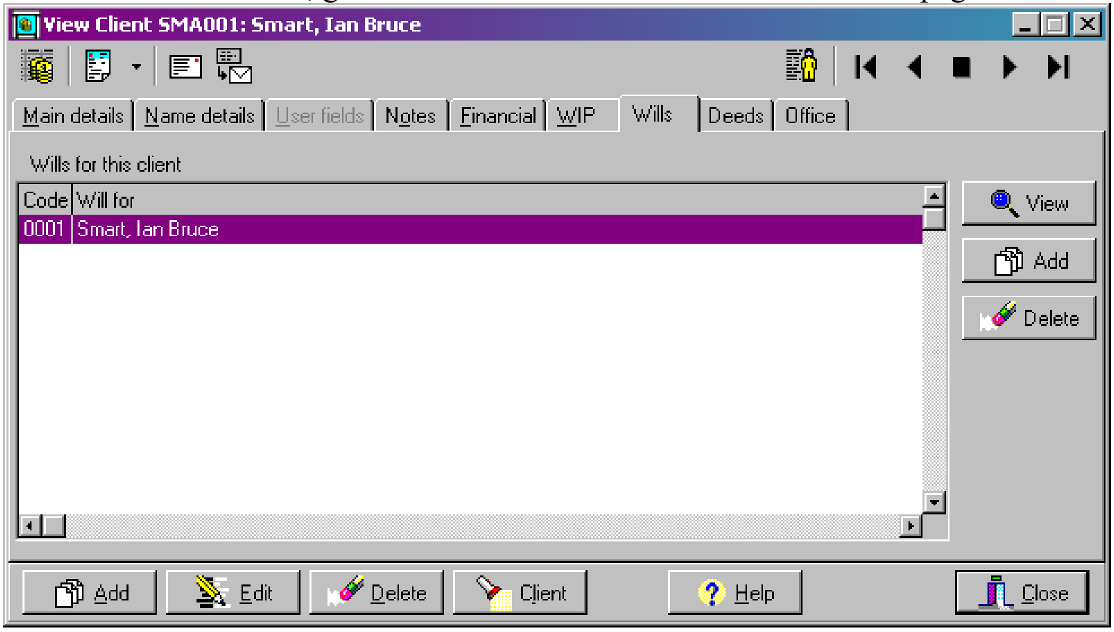
To set up a deed type, click on the **Add** button:



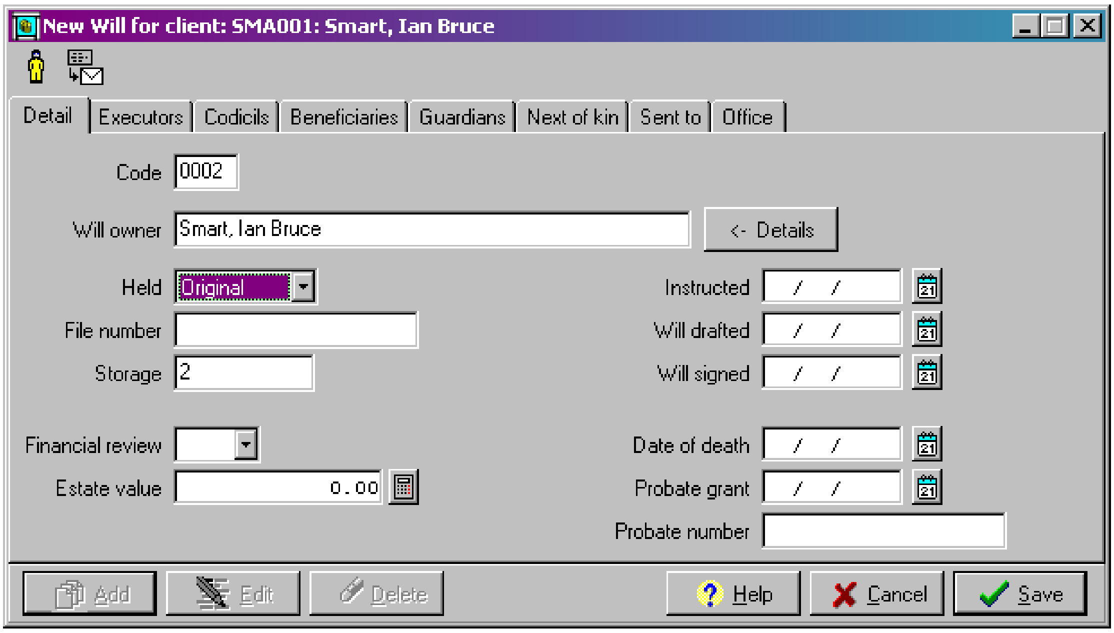
Enter a code and description and click on the **OK** button.

Adding a will to a client

To add a will to a client, go to the client record and select the **Wills** tab page:



Click on the **Add** button to add a new will:

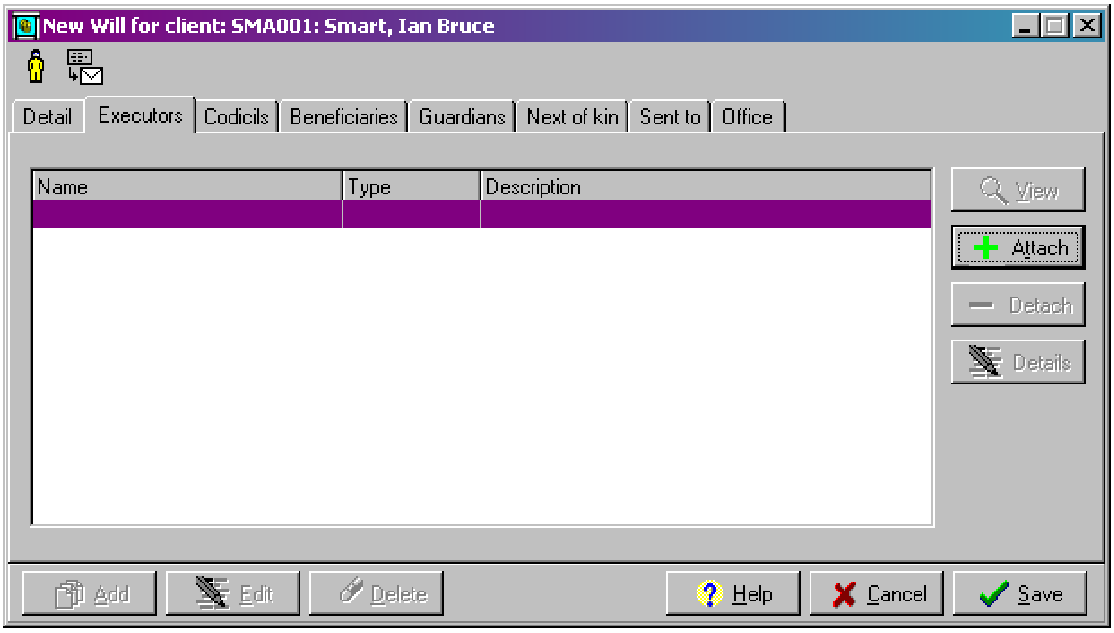


The fields available on the **Detail** tab page are:

- **Code** is the will's unique code within the client. It is a 4 digit numeric code. If you are adding a record, you should, in most cases, accept the default code that appears. This represents the next available code for a new will.
- The **Will owner** is the individual to whom the will belongs. Use the **Details** button to the right to assign or look at the linked individual.
- The **Held** field allows you to specify whether you hold an original or copy of the will.
- The **File number** is an associated file number.
- **Storage** is the location where the will is physically stored.
- **Financial review** allows you to record whether the client requires a regular financial review.

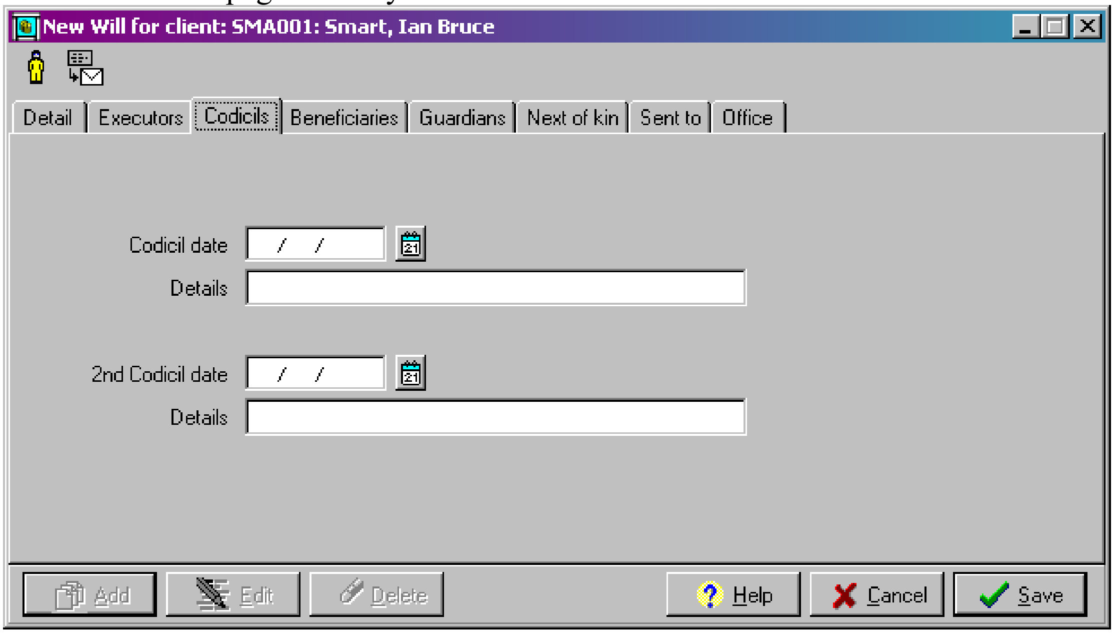
- The **Estate value** is the value of the estate.
- **Instructed** is the date that the client instructed you to write the will.
- **Will drafted** is the date that the will was drafted.
- **Will signed** is the date that the will was signed.
- **Date of death** is the date when the client died.
- **Probate grant** is the date when probate was granted.
- **Probate number** is the probate number.

The **Executors** tab page allows you to record information about the executors on the will:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

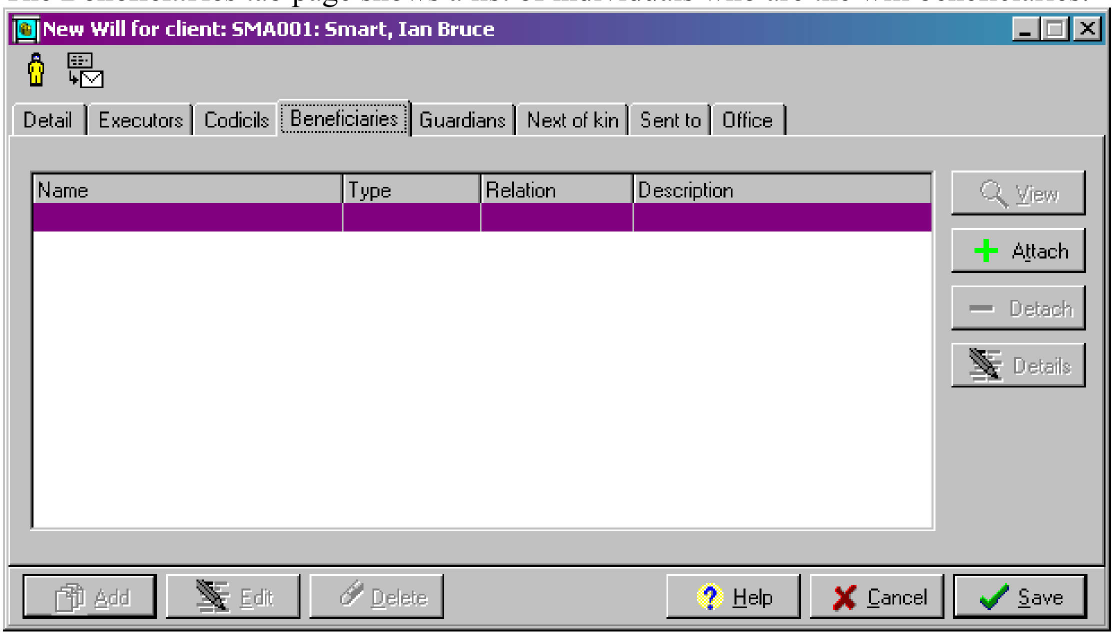
The **Codicils** tab page allows you to add details of two codicils:



You can record codicil details against the will. The fields available on the **Codicil** page are:

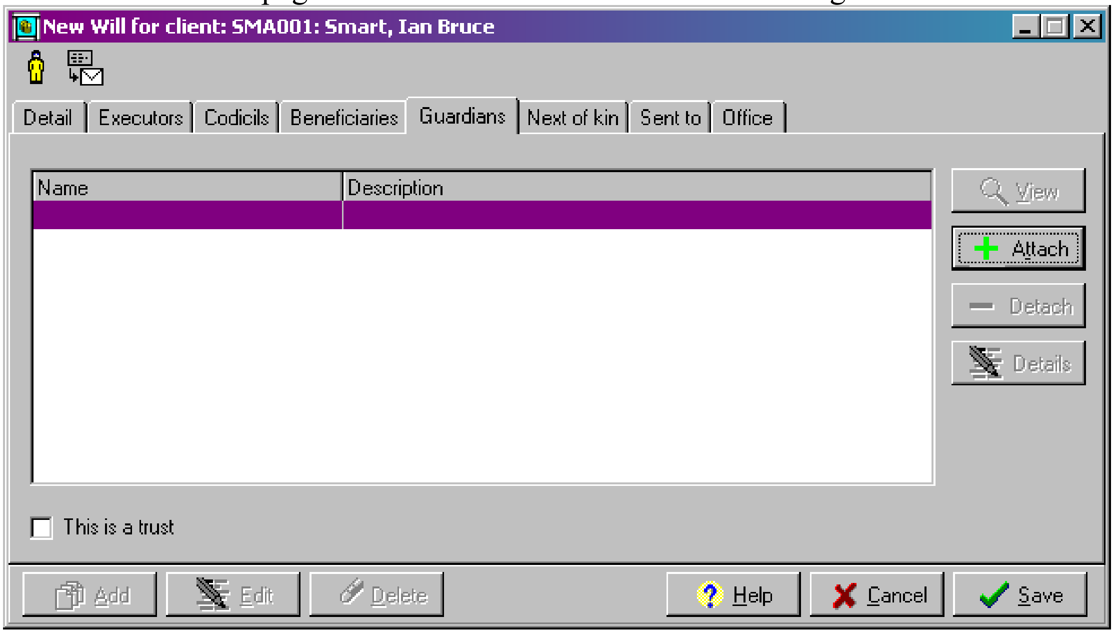
- **Codicil date** is when the will was modified.
- **Details** allows you to record details of the modification.
- There is also the option to add details of a second codicil.

The **Beneficiaries** tab page shows a list of individuals who are the will beneficiaries:



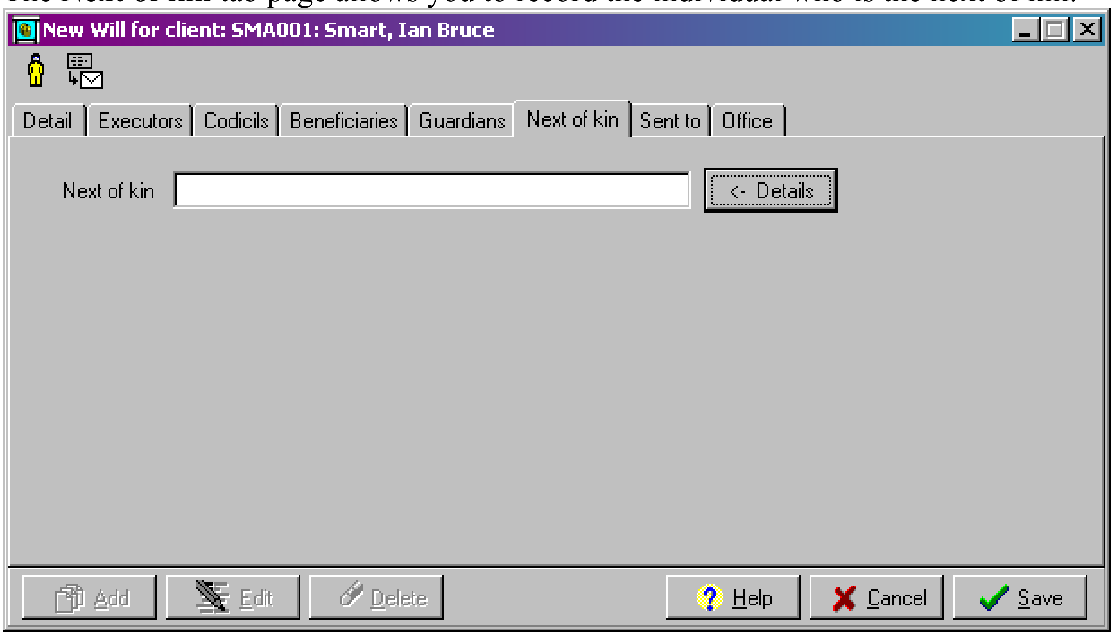
- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Guardians** tab page shows a list of individuals who are the guardians:



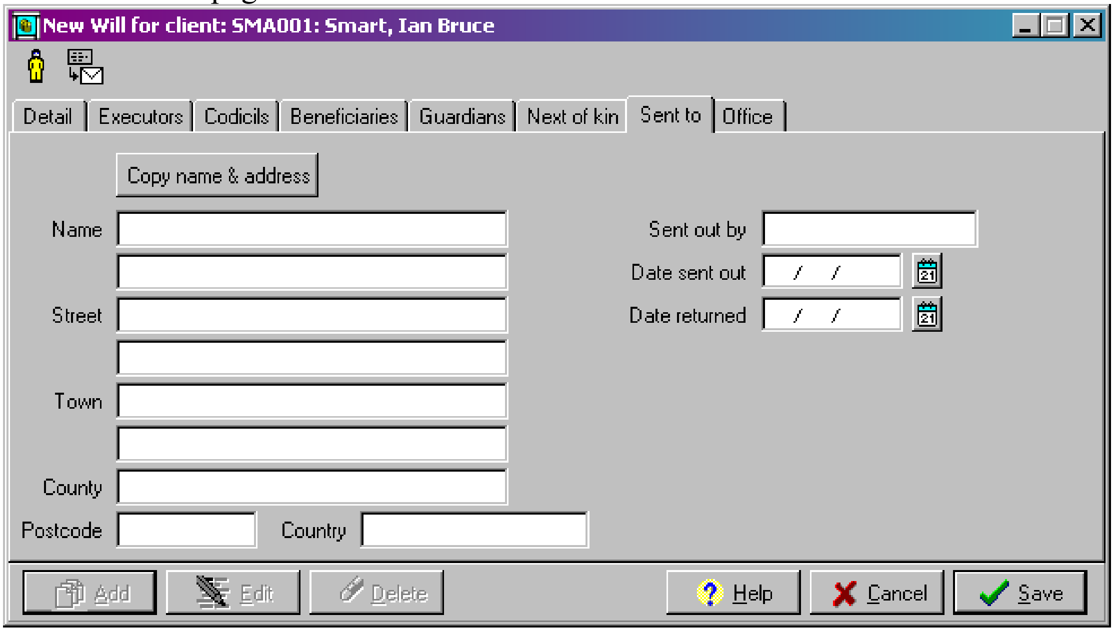
- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.
- **This is a trust** indicates a trust has been setup.

The **Next of kin** tab page allows you to record the individual who is the next of kin:



Use the **Details** button to the right to assign or look at the linked individual.

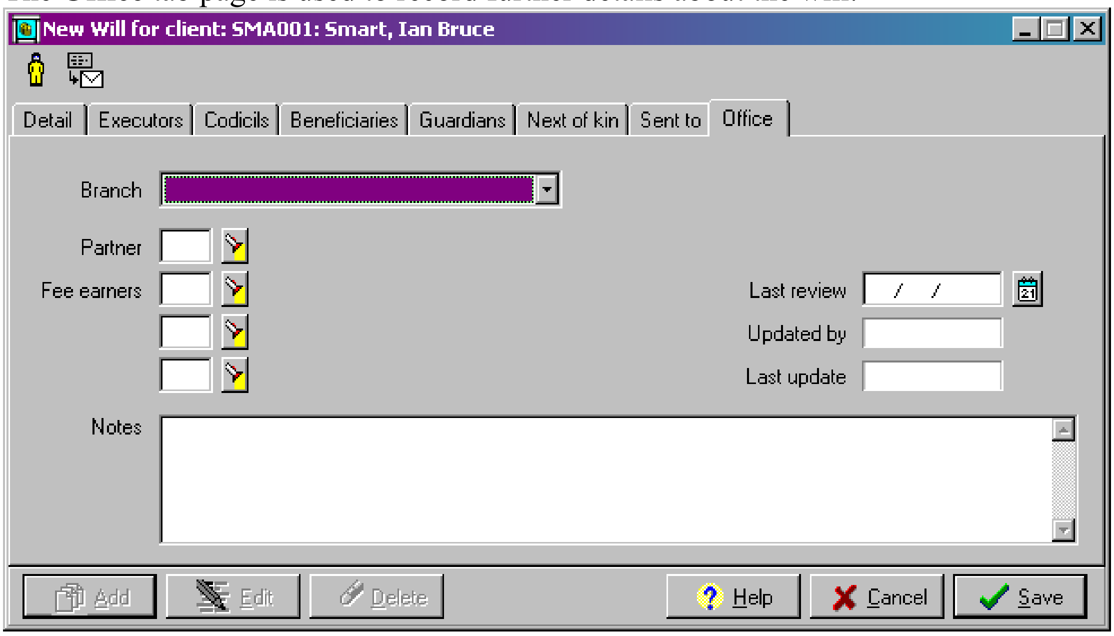
The **Sent to** tab page can be used to record details of where the will has been sent:



You can record:

- The name and address of where the will has been sent. Use the **Copy name & address** button to copy the name and address from another individual record.
- **Sent out by** is the person who sent it out.
- **Date sent out** is the date it was sent out.
- **Date returned** is the date it was returned.

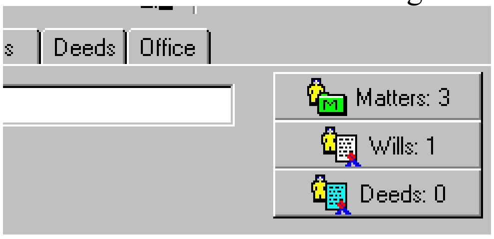
The **Office** tab page is used to record further details about the will:



The fields available on the **Office** tab page are:

- **Branch** is filled in if this will is specific to a branch.
- **Partner** is an associated partner.
- **Fee earners** are associated fee earners.
- **Notes** can be used for any miscellaneous notes.
- **Last review** is when the will was last reviewed.
- **Updated** by is who updated the will last.
- **Last update** is when the will was last updated.

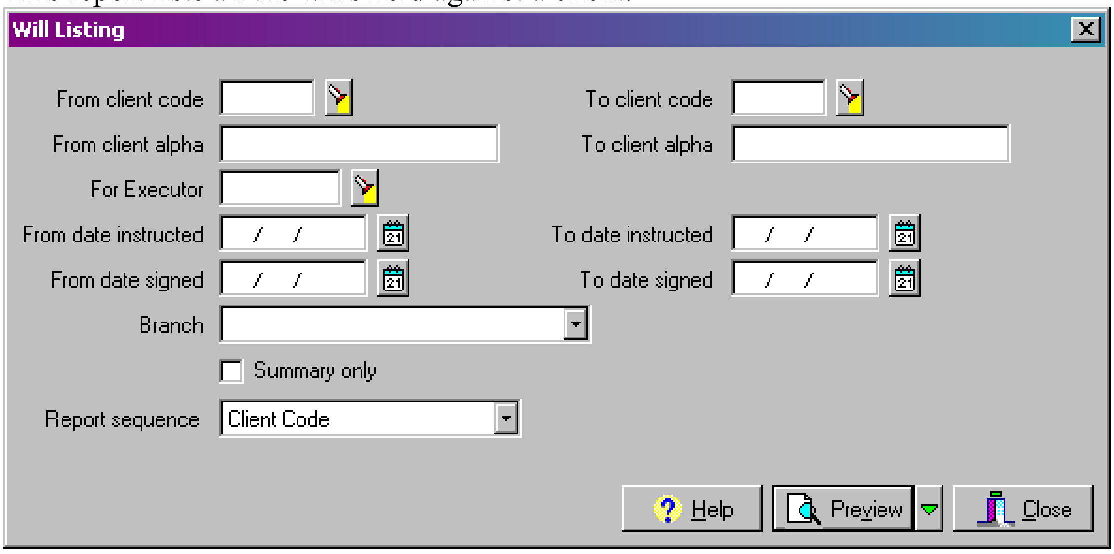
Click on the **Save** button to save the will details.
The will details will be stored against the client record:



Reporting on Wills

You can produce a list of wills on Millennium by selecting the **Reports** scroll and clicking on **Wills**>>**Will Listing**:

This report lists all the wills held against a client.

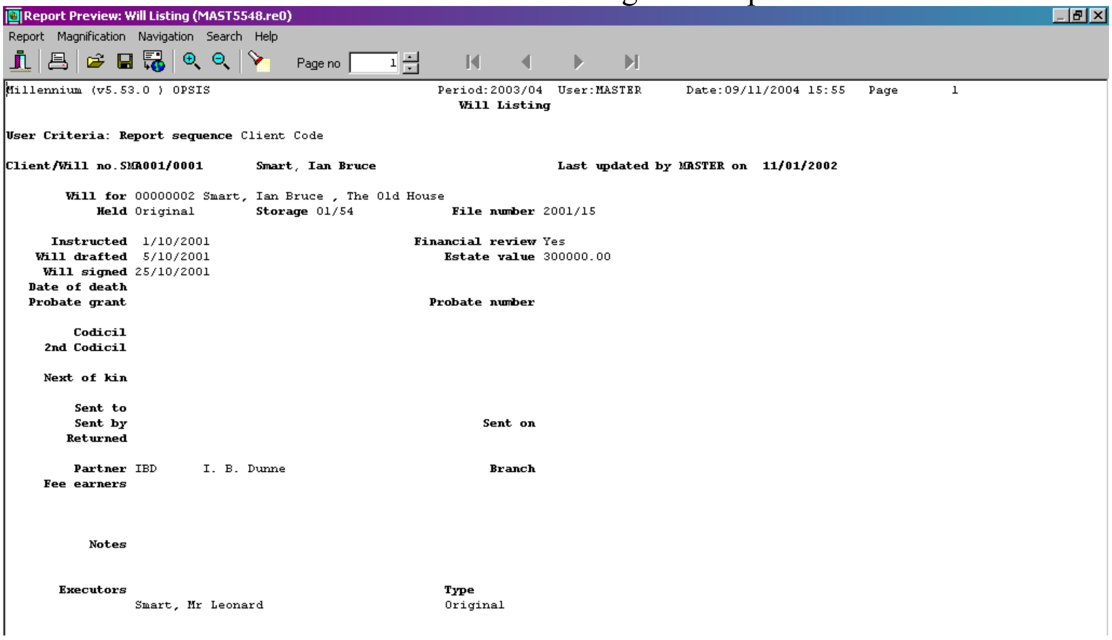


The following sort fields are available:

- **From client code** - only wills for this client code or following codes will be selected.
- **To client code** - only wills for this client code and preceding codes will be selected.
- **From client alpha** - only wills with clients whose alpha code matches or follows this will be selected.
- **To client alpha** - only wills with clients whose alpha code matches or precedes this will be selected.
- **For executor** - only wills for this executor are selected.
- **From date instructed** - only wills instructed on or after this date are selected.
- **To date instructed** - only wills instructed on or before this date are selected.
- **From date signed** - only wills signed on or after this date are selected.
- **To date signed** - only wills signed on or before this date are selected.
- **Branch** - only wills for this branch are selected.
- **Summary** - summarised listing excluding the details if ticked.

- **Report sequence** - allows you to specify the report order.

Click on the **Preview** button to view the resulting Wills report:



Millennium (v5.53.0) OPSIS Period:2003/04 User:MASTER Date:09/11/2004 15:55 Page 1

Will Listing

User Criteria: Report sequence Client Code

Client/Will no.SMA001/0001 **Smart, Ian Bruce** **Last updated by MASTER on 11/01/2002**

Will for 00000002 Smart, Ian Bruce , The Old House
Held Original **Storage** 01/54 **File number** 2001/15

Instructed 1/10/2001 **Financial review** Yes
Will drafted 5/10/2001 **Estate value** 300000.00
Will signed 25/10/2001
Date of death
Probate grant **Probate number**

Codicil
2nd Codicil

Next of kin

Sent to
Sent by **Sent on**
Returned

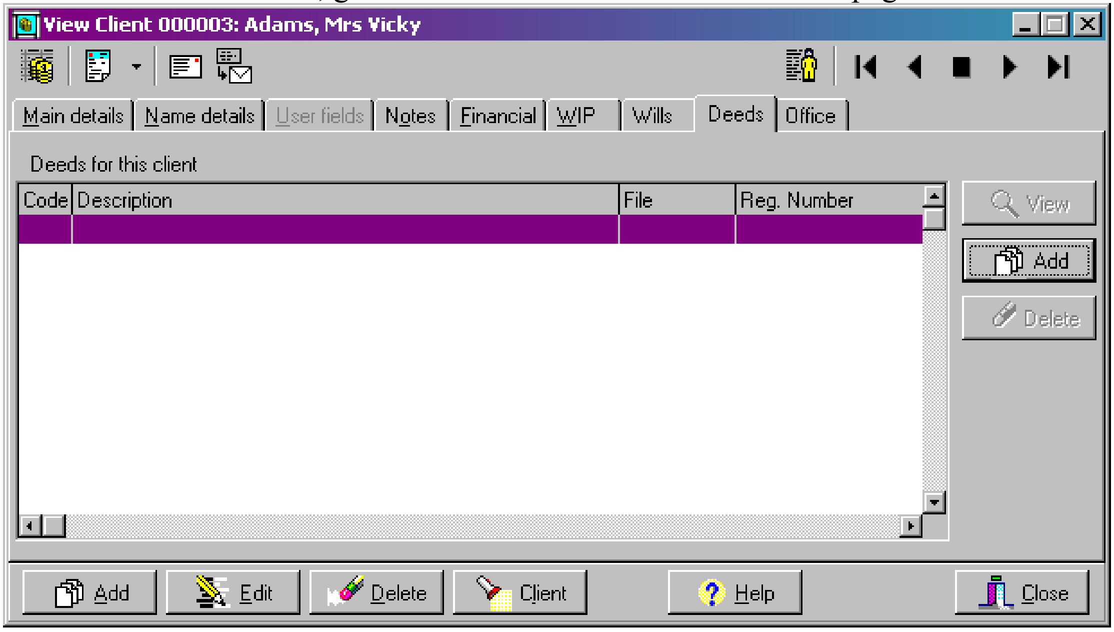
Partner IBD I. B. Dunne **Branch**
Fee earners

Notes

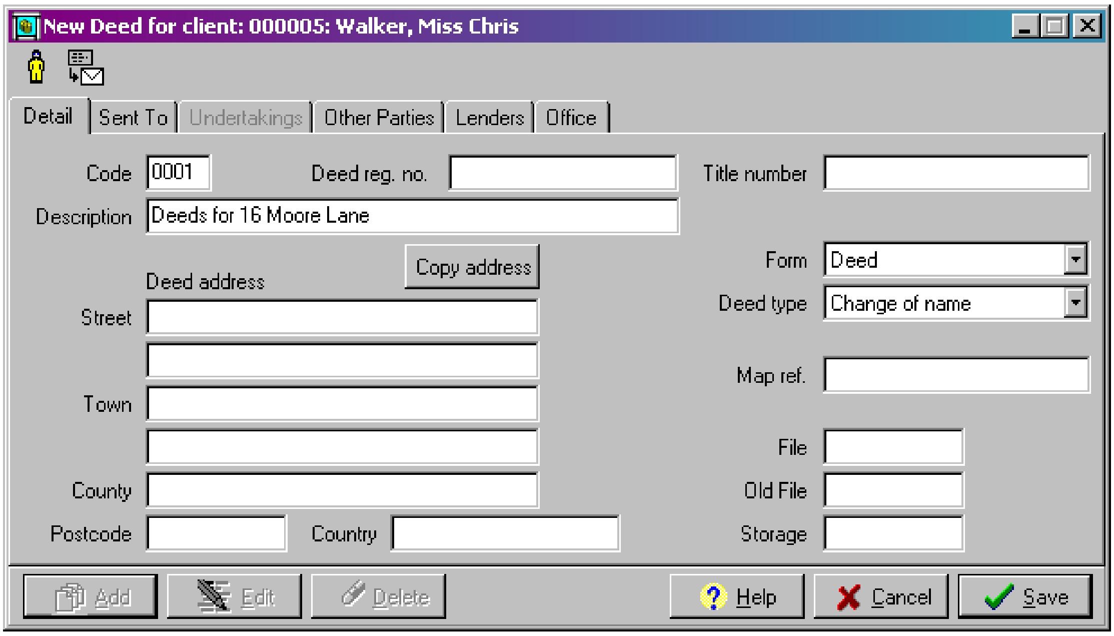
Executors **Type**
Smart, Mr Leonard Original

Adding a deed to a client

To add a deed to a client, go to the client and select the **Deeds** tab page:



Click on the **Add** button to add a new deed:

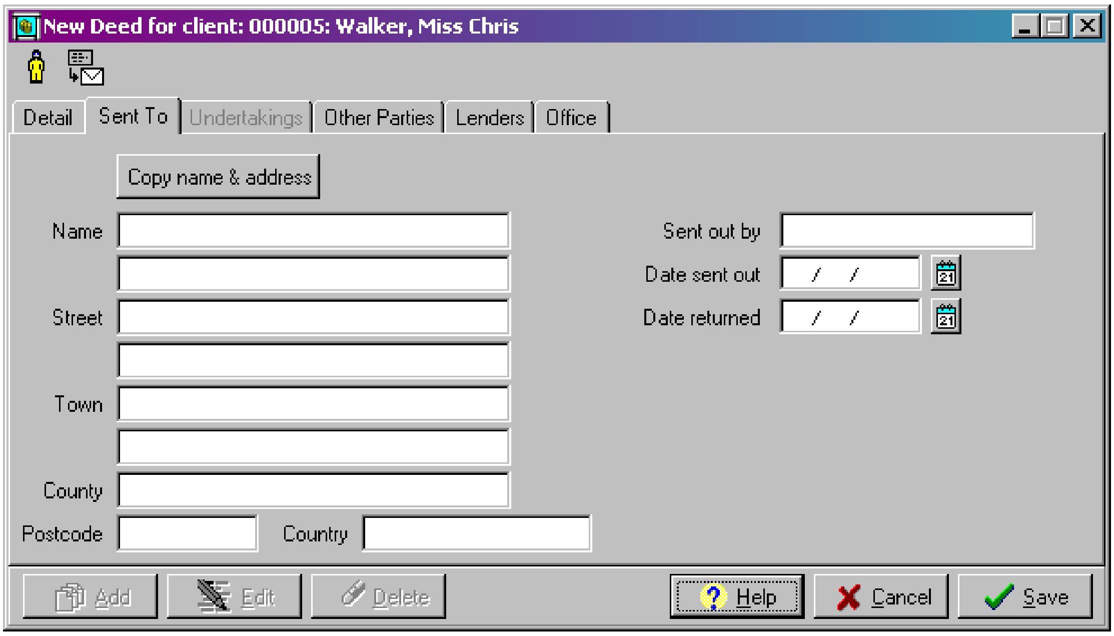


You can add relevant details for this deed to the **Detail** tab page:

- **Code** is the deed's unique code within the client. It is a 4 digit numeric code. If you are adding a record, you should, in most cases, accept the default code that appears. This represents the next available code for a new deed.
- The **Deed reg. no.** is the deed registration number.
- The **Title number** is the deed title number.
- **Description** is the deed description.
- **Form** is the deed type of form.
- **Deed type** is the deed type.
- **Map ref.** is the property map reference.
- **Deed address** is the deed address.

- **File** is an associated file reference.
- **Old file** is the old file reference.
- **Storage** is where it is stored. If you enter a number into this field it will be remembered and next time you add a new record the next number will be used as a default.

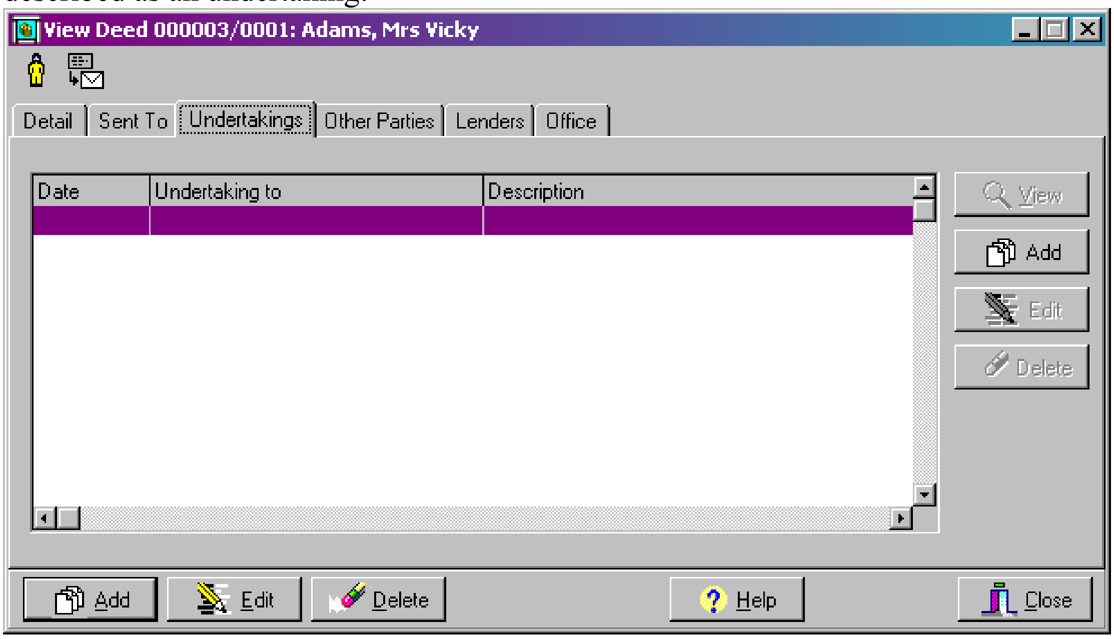
The **Sent to** tab page can be used to record information about where the deeds have been sent:



You can record:

- The name and address of where the deed has been sent. Use the **Copy name & address** button to copy the name and address from an individual record.
- **Sent out by** is the person who sent it out.
- **Date sent out** is the date it was sent out.
- **Date returned** is the date it was returned.

The **Undertakings** tab page can be used to record information about undertakings included in the deed. If a solicitor makes a formal agreement to do something or to carry out a particular course of action as part of the service to a client, then this can be described as an undertaking:

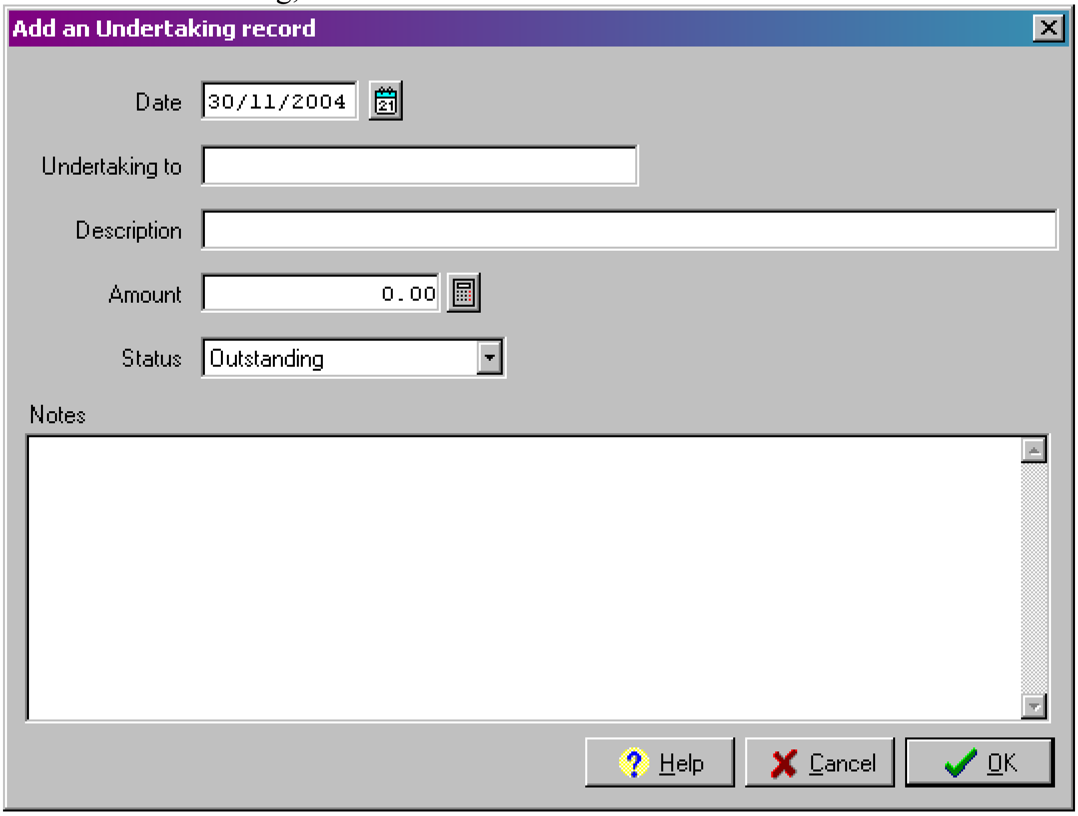


Please note that the Undertakings tab page is only viewable AFTER the deed record has been saved.

- The **View** button allows you to view an undertaking.
- The **Add** button allows you to attach an undertaking to the deed.

- The **Edit** button allows you to edit an undertaking.
- The **Delete** button allows you to delete an undertaking from the deed.

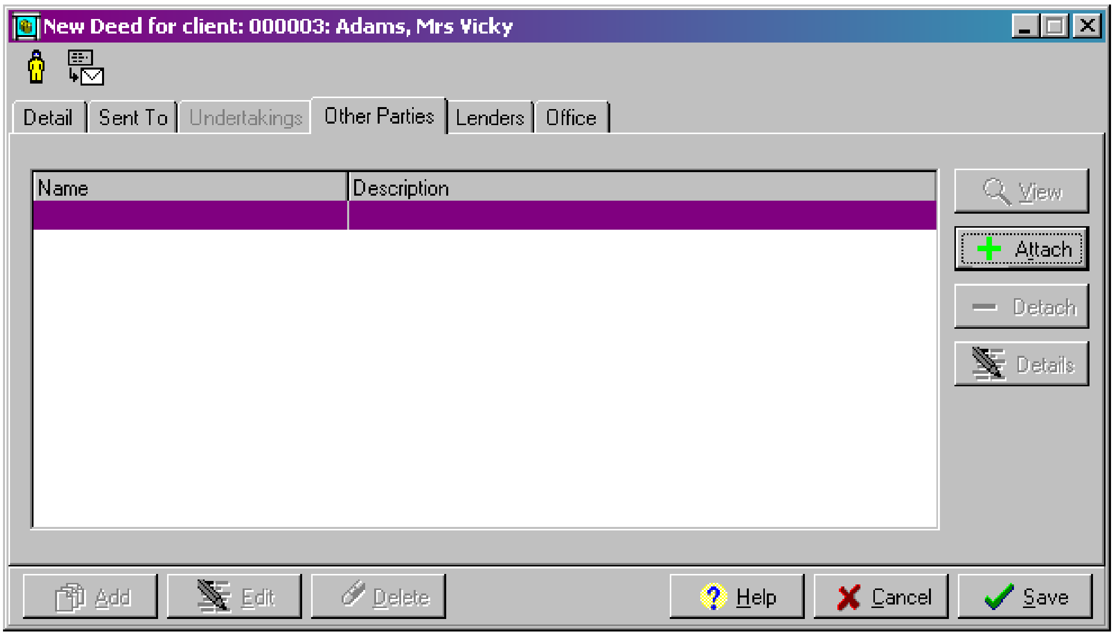
To add an undertaking, click on the **Add** button:



You can record the details of an undertaking in the deeds:

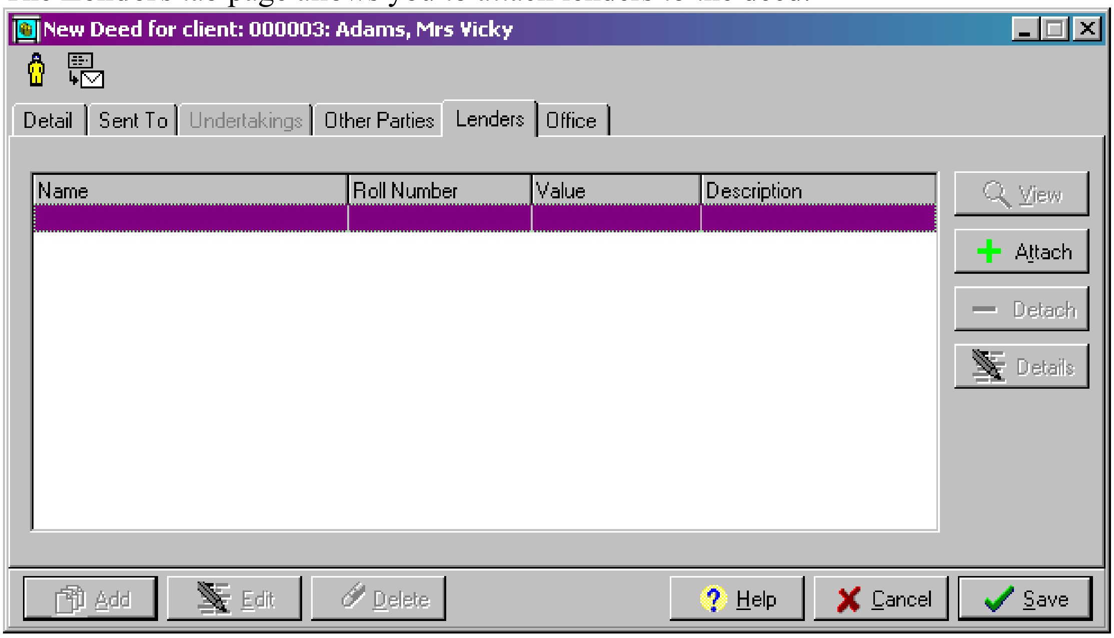
- **Date** is the date of the undertaking.
- **Undertaking to** is the client, individual, company or other entity for whom the undertaking is to be carried out.
- **Description** is a description of the undertaking.
- **Amount** is the amount of the undertaking.
- **Status** is outstanding if the undertaking has not been carried out or cleared if it has.

The **Related Parties** tab page allows you to attach other parties who are related to the deed:



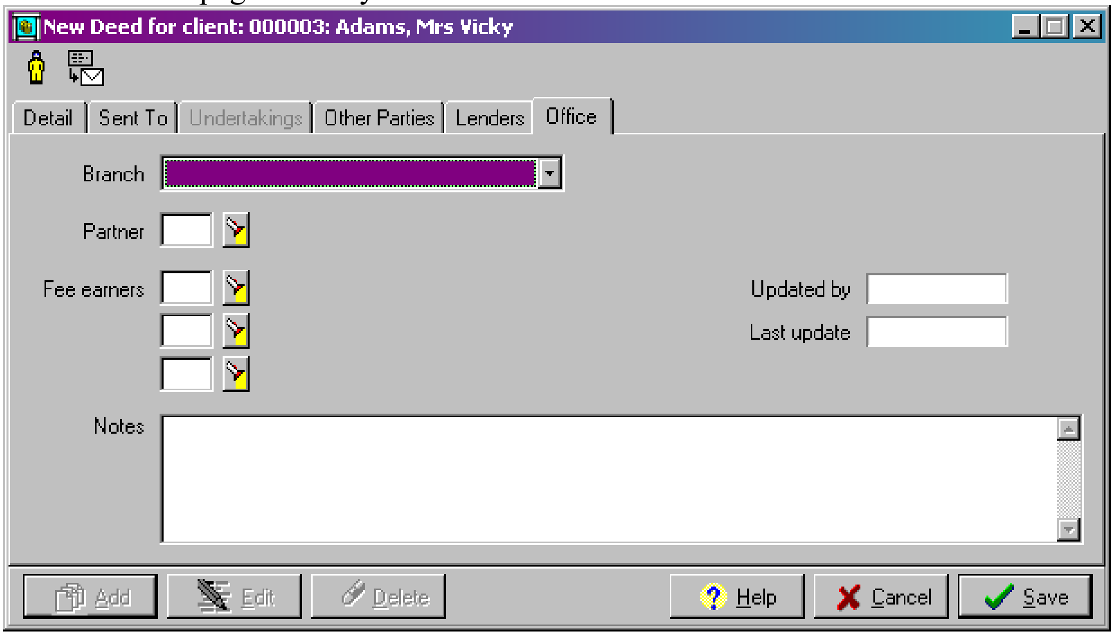
- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Lenders** tab page allows you to attach lenders to the deed:



- The **View** button allows you to view an individual.
- The **Attach** button allows you to attach an individual to the list.
- The **Detach** button allows you to remove an individual from the list.
- When an individual is attached you will be asked to give details about it. The **Details** button will let you view or change these details later.

The **Office** tab page allows you to record office related information for this deed:

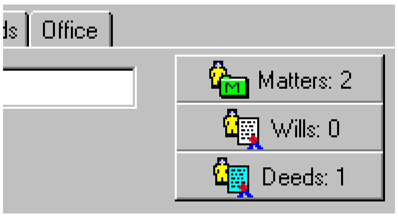


The fields available on the **Office** tab page are:

- **Branch** is filled in if this deed is specific to a branch.
- **Partner** is an associated partner.
- **Fee earners** are associated fee earners.
- **Notes** can be used for any miscellaneous notes.
- **Updated by** is who updated the deed last.
- **Last update** is when the deed was last updated.

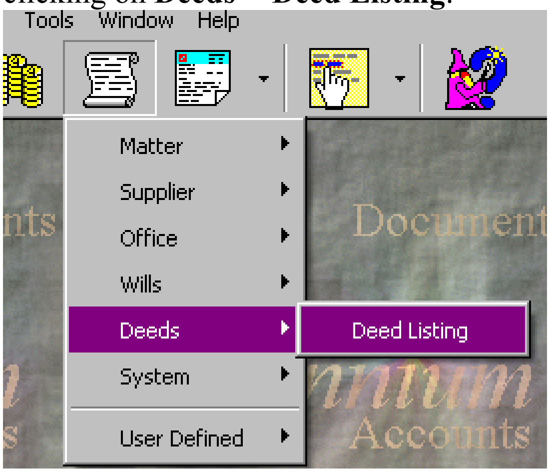
Click on the **Save** button to save the deed details.

The deed details will be stored against the client record:

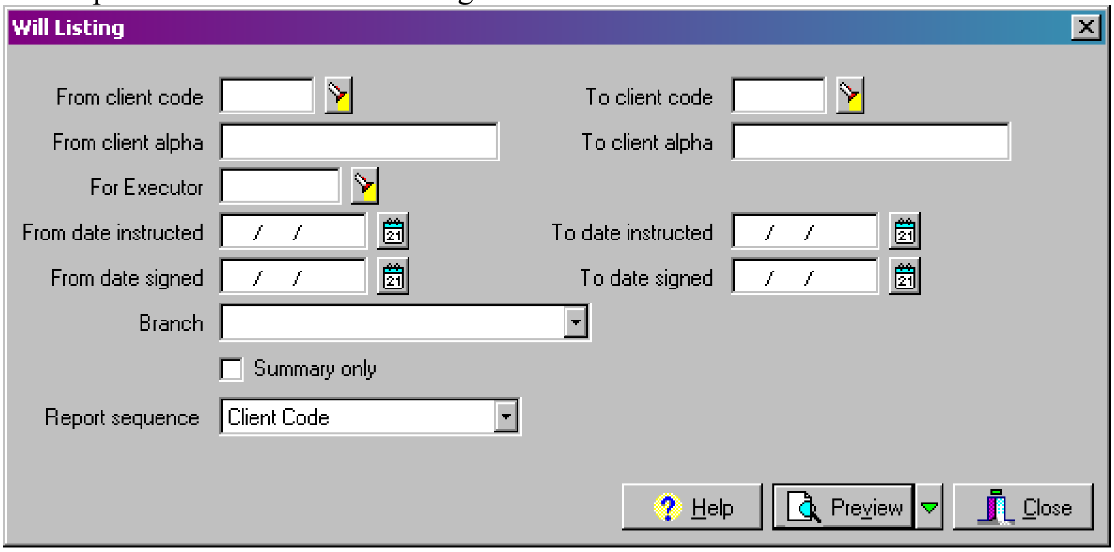


Reporting on Deeds

You can produce a list of wills on Millennium by selecting the **Reports** scroll and clicking on **Deeds**>>**Deed Listing**:



This report lists all the deeds held against a client.



The following sort fields are available:

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- **To client code** - only wills for this client code and preceding codes will be selected.
- **From client alpha** - only wills with clients whose alpha code matches or follows this will be selected.
- **To client alpha** - only wills with clients whose alpha code matches or precedes this will be selected.
- **For executor** - only wills for this executor are selected.
- **From date instructed** - only wills instructed on or after this date are selected.
- **To date instructed** - only wills instructed on or before this date are selected.
- **From date signed** - only wills signed on or after this date are selected.
- **To date signed** - only wills signed on or before this date are selected.
- **Branch** - only wills for this branch are selected.
- **Summary** - summarised listing excluding the details if ticked.
- **Report sequence** - allows you to specify the report order.

Click on the **Preview** button to view the resulting deeds report: