



TEMPLATE LETTER – SOLICITOR to EXECUTOR OF CLIENT, WITH CLIENT’S CONSENT

Dear xxx,

I have been asked by [Will Maker – first and surname] to let you know that they have appointed you as an executor in their will, trusting that you will help to see through their wishes if and when the need arises.

[Will Maker- first name] will probably talk to you about this sometime soon if they have not done so already. However, I attach an outline of what your role might entail, so you understand how to deal with that in due course.

I would be happy to discuss this and any questions you have on it, so please feel free to set up a call or drop in here when that is possible again - for which there will be no charge.

If you complete and return the attached form in the stamped addressed envelope provided, we will be in touch to arrange that discussion.

Hopefully we can be of some assistance.

All the best,

ATTACHMENTS:

- A good factsheet / leaflet / FAQ
- A response form to cover/ask about:
 - Request to set up a meeting or telephone call
 - How best to get in touch – telephone or email?
 - What days and times of day would work best?
 - Email address?
 - Telephone number
 - How best to meet – in person (when we can), telephone or video call?
 - Consent to keep in touch to cover GDPR

NOTE: You could send a copy of this letter to the client to prompt them to have a discussion too, which should be a good recommendation for you and your practice.

CONTACT US

FOR MORE information, advice and promotional material, contact [Allan Carton](#) at [Inpractice](#) either by email to acarton@inpractice.co.uk or [schedule a free 30-minute telephone or video call here >>](#)