

Professional Attorney Programme

Specialist services from the Tax and Estate Planning Department

whitehead-monckton.co.uk



Introduction

Choosing your Attorneys is an important decision and your Attorneys should be aware of the responsibility they are taking on when agreeing to act.

By choosing to appoint Whitehead Monckton as professional Attorneys you are entrusting us with your affairs and we take a “hands on” approach to this responsibility.

Our Professional Attorney Programme allows us to keep up to date with your wishes, feelings and beliefs and to consider them from an impartial perspective when it comes to decision making in the future, on your behalf.

The Professional Attorney Programme from Whitehead Monckton is a fixed-fee retainer service where we will review your Lasting Power of Attorney arrangements and proactively contact you once a year to give you the opportunity to meet with your Professional Attorney.

This meeting will take place to ensure you are still happy with the choices you have made, that we are aware of where we can access practical information, and to keep informed as to your general health and wellbeing.

If you appoint a Professional Attorney to act in a joint and several capacity with your family members, we will be able to discuss how we should work in conjunction with them to ensure that the most efficient way of working is achieved.

This annual review ensures that we are acting with the highest degree of care and skill to ensure that if you lose capacity to manage your own affairs, you are comfortable in your decision that Whitehead Monckton will always act in your best interests.

Enrolment

The Professional Attorney Programme is a bespoke service, exclusively for clients who have chosen to appoint **Whitehead Monckton** as their Attorneys in their Enduring or Lasting Powers of Attorney.

By signing below, you agree to enrol in the Professional Attorney Programme and to the following:-

1. Member clients are entitled to the first year of maintenance from the date of enrolment.
2. Payments to the firm are made by Standing Order.
3. Member clients wishing to withdraw from the Programme are required to give 28 days written notice of their desire to do so. Notice should be sent to **Whitehead Monckton** at 5 Eclipse Park, Sittingbourne Road, Maidstone, Kent ME14 3EN. On receipt, your Professional Attorney will disclaim their entitlement to act and you will lose all privileges of the Programme.
4. Member clients withdrawing from the Programme are not entitled to any refund if they choose to withdraw from the Programme.
5. Member clients agree that they will inform the firm of any material change in their financial circumstances such as their health, marital status, family situation or other financial matters that may affect the arrangements in place under this firm's services.
6. If member clients require a home visit, this will be charged at the appropriate rate based on the fees applicable at the time.
7. **Whitehead Monckton** retains a continuing right to modify the terms of The Professional Attorney Programme including the fee, the benefits and enrolment requirements. In the event of such change, member clients will receive written notice of the intended changes 28 days before they are brought into effect.

I/we wish to enrol in The Professional Attorney Programme in accordance with the above terms for £100 +VAT per annum

Signed

Print Name

Dated

Signed

Print Name

Dated



Please complete the following Standing Order Mandate and return to your bank.



Standing Order Mandate

To the Manager	Branch sort code
Address	<div><div></div><div></div> – <div><div></div><div></div></div> – <div><div></div><div></div></div></div>
	Bank/Building Society Account number
	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>
Post Code	

Instruction to your Bank or Building Society
Please pay to Whitehead Monckton Solicitors a Standing Order from the account detailed in this instruction

Name(s) of Account Holder(s)	Instruction
I/we, [Name]	Please pay the sum of: £120
	ANNUALLY commencing on: DD/MM/YEAR
of, [Address]	until further notice in writing to the following recipient:
	Sort code 30–95–37
	Account number 00005763
	Account name Whitehead Monckton
	Receiving bank: Lloyds Bank Plc. 18 Week Street, Maidstone, Kent
Post Code	Signature(s)
	Date



Disclaimer: The Professional Attorney Programme provides members with an annual review, and general advice, to take additional steps to update your Power of Attorney arrangements, after having considered your personal circumstances and wishes. It is not a comprehensive review of your financial circumstances and further advice should be sought if you are unsure of the impact of any changes in law or practice on your affairs.



With offices in Maidstone, Tenterden and Canterbury and Canary Wharf, Whitehead Monckton has grown to be one of the largest legal practices in the area.

We balance our practice between our business and personal clients. This ensures that every single client will receive the very best advice, support and quality of work, no matter what their background, tailored to their specific needs.



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Canterbury
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T 01227 643250
F 01227 643260

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High Street
Tenterden
Kent TN30 6BN
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