

Client's full name:

**Please note:** When conducting a telephonic consultation, please state that the call is being recorded and confirm with the Client whether they agree to this.

## Introduction



### 1. Consultant

- Your Consultation Guide - Emailed and Explained
- Discuss: Where are you now, Intermediary Disclosure, Letter of Authority and Important Contact Details



### 2. Capital Legacy

- Introduce Capital Legacy and discuss the Legacy Guide available in your Client Pack

## To be discussed and concluded during this meeting

1

### Last Will and Testament draft

- Legacy Protection Plan™ Application and Will Information
- Drafting of your Last Will and Testament
- On-site drafting (preferable)
- Signing and Safekeeping Guidelines explained – Legacy Guide
- Free Will Collection Service – Legacy Guide

2

### Calculation of legal fees and associated costs upon death

- Legacy Blueprint calculation done and explained (compulsory – must be logged onto Client profile)
- Discuss Plan Value and each Benefit

3

### Legacy Protection Plan™ – Solution to the legal fees and associated costs

- Product information explained – Legacy Guide
- Application Form (compulsory – must be completed)
- Start date and debit order dates explained (Note: discuss 45-day free cover, if applicable)

4

### Expect to receive the following:

- Last Will and Testament to be concluded and emailed after the consultation
- Legacy Blueprint Planner™ calculation – To be emailed and explained
- Plan Schedule and Plan Terms and Conditions to be emailed after consultation

## Post-meeting procedures

1

### Assistant Consultant

- Amendments to be done to the Last Will and Testament
- Follow up on missing information

2

### Signing and Safekeeping

- Signing and Safekeeping Guidelines explained – Legacy Guide
- To ensure that your Last Will and Testament is signed correctly, please scan and email a copy of the signed document to [signedwills@capitallegacy.co.za](mailto:signedwills@capitallegacy.co.za).
- Place your original Last Will and Testament in the folder provided and keep it in a safe place. Tell at least one family member or friend where you have stored this.
- For additional safekeeping, we will keep a second, signed and original Last Will and Testament for you in our vault. To action this please post, courier or deliver your Last Will and Testament to us as per the Signing and Safekeeping Guidelines in the Legacy Guide.

3

### Free Will Collection Service

- Discuss the process of the Free Will Collection Service