YOURLEGACYWILL

Your customer handbook

Prepare your instructions, work with your adviser and keep track of your documents.

Practical how-to guidance for the functionality available in YourLegacyWill.

November 2026 · Shared precedent governance and source-linked drafting

Start online: https://yourlegacywill.com/help?guide=customer

Use the right workspace and sign-in role. These guides contain no client data and do not grant access to the application. Features awaiting setup are identified throughout.

This guide does not replace professional legal advice or independent security, privacy and operational validation.

Find your next step

Choose a topic, then follow the numbered steps. The online help centre links directly to the relevant screens.

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01 / HOW TO

How your writer uses the shared legal library

Understand source-based wording, private assessments and the checks before a Will can be approved.

01 Your writer can consult published shared wording and its recorded legal sources alongside your saved questionnaire. Matching a screening answer is a suggestion for further review; it does not establish that the wording is suitable for your circumstances.

02 Your writer records why they accept, reject or defer a suggestion. A missing or conflicting answer needs clarification. Those assessments stay inside your firm; your answers and Will are not added to the shared library.

03 Shared wording is copied into the firm’s private library as an unapproved candidate. It needs the firm’s own professional review before use, and the exact completed Will still needs its normal professional approval and your acceptance.

04 Your writer’s private review copy can include a clearly separated non-operative source appendix; internal review and permission records are kept out of customer copies. The exact shared wording version, source versions and legal-review records remain linked to the saved draft. These references do not certify the validity of your individual Will.

05 If a source or permission expires, a reviewed version is withdrawn, or a replacement is published, further use of affected wording can be blocked. Your firm must review it and prepare a fresh version when appropriate; your earlier answers and document history are preserved.

Before you rely on this

The shared library does not send an automatic email or portal notification when your writer records an assessment. Use the existing private communication or review-discussion tools for questions.

How your writer uses the shared legal library

Reference links are research starting points. No completion date, legal validity, tax treatment or signing permission is promised. Your firm’s private templates and client documents stay separate from the shared collection.

Open in YourLegacyWill

Your draft review
https://yourlegacywill.com/drafting

Your messages
https://yourlegacywill.com/communications

02 / HOW TO

From your instructions to a complete review draft

Your writer resolves the required choices before generating operative Will wording.

01 Complete and check your questionnaire as usual. The writer may need you to clarify substitute beneficiaries, class membership, trust terms, home ownership or an organisation receiving a gift. Do not create a second account or matter to answer those questions.

02 The writer records explicit completion decisions against your saved instructions. Those decisions do not silently change your questionnaire answers or identify a future child by an invented name or date of birth.

03 A draft cannot be generated while the required terms remain unresolved. Private wishes, tax questions and execution warnings appear in a separate non-operative reviewer appendix, rather than being mixed into the gifts.

04 This is still a private staff review draft marked DRAFT — NOT FOR SIGNING. A completed worksheet or a PDF does not approve the Will, establish a tax result or authorise signing. Your firm must use its existing professional review and customer approval process before sharing a final signing version.

Before you rely on this

The worksheet, internal drafts and private appendix do not send automatic customer emails or notifications. Your adviser deliberately shares any clarification or final document through the existing authorised process. No completion date or legal validity is promised.

An unidentified or unverified organisation remains blocked. The standard controlled route currently requires a verified incorporated legal recipient; other arrangements require bespoke professionally reviewed firm wording.

From your instructions to a complete review draft

Open in YourLegacyWill

My questionnaire
https://yourlegacywill.com/

My matter
https://yourlegacywill.com/portal

03 / HOW TO

Give clear instructions for a complex Will draft

Keep individual gifts, home interests, trusts and family support clear for your Will writer.

01 In Children and family arrangements, use the person already recorded when an affected beneficiary is the same person. This explicit link carries the dependency recorded in your people register. A similar name alone does not merge records or accounts. Future classes remain separate and need no invented date of birth.

02 Keep each residue gift, home occupation, capital remainder and specific legacy separate. You can record the asset and your share, the type of legacy and a cash amount. A proposed charitable gift is a wish, not confirmation of tax exemption or the recipient’s charitable status. Choose advice needed if the terms are not decided.

03 Your writer can prepare a private Will review draft from your saved instructions after resolving the required operative choices. If a required term is missing, generation is blocked. Historical versions may retain earlier marked questions. Completing the questionnaire does not appoint anyone, create an effective trust or make a Will ready for signature.

04 Optional AI support receives coded arrangements, explicit gift preferences and dependency context. Names, addresses, dates of birth, private notes, asset descriptions, specific legacy amounts and the full Will remain excluded. Missing information is not treated as No, proof of a minor or proof that you do not understand.

05 Read the exact draft when your writer deliberately shares a professionally approved version through the existing review process. Your writer must settle complex clauses first. No automatic email or customer release is sent when an internal draft or AI assessment is saved.

Before you rely on this

Earlier answers, documents and AI recommendations remain in their original audit history. Changing answers requires a new source-linked review; an old review is not silently rewritten.

Give clear instructions for a complex Will draft

> A proposed charitable legacy uses a concise heading. Its exact legal recipient and status remain explicit review decisions in the clause; the heading does not verify a charity.

Open in YourLegacyWill

My questionnaire
https://yourlegacywill.com/

My matter
https://yourlegacywill.com/portal

04 / HOW TO

Use the simpler forms on your phone or computer

Complete the main fields first, with optional details kept together.

01 Follow the labels and complete the required fields. Open an optional section only when you need it; closing the section does not remove entered values. If a required field needs attention, its section opens so you can correct it.

02 For a new invitation, sign in or create an account with the invited email, verify it if requested, and accept. Your firm prepares the invitation without asking you to supply an existing account or Will.

03 On a phone, Report issue appears after the page content so it does not cover Save or Continue. Keep names, Will contents, passwords and other sensitive information out of support reports.

Before you rely on this

This presentation change does not alter who can see your documents, submit instructions or approve a Will. Saving a form still requires a saved-success response. If the connection fails, refresh and inspect the saved record before trying again.

A support report remains visible to platform support and your authorised firm owner. Submission displays its ticket reference and initial priority; tracked status and any estimated dates appear in the support centre. A report does not itself promise a resolution date or send a customer notification. Existing notification preferences still apply.

05 / HOW TO

Keep a private signed Will copy

Store a scanned reference copy on your existing matter without replacing the paper original.

01 Open Documents & requests in your customer workspace and choose Keep a private signed Will copy. Choose your existing Will matter; no new account or matter is created.

02 Choose a PDF, PNG or JPEG up to 10 MiB. Confirm that it is a reference copy and that you will keep the original safely. Probate normally requires the original Will. Uploading does not verify signatures, witnessing, authenticity or legal validity, and never marks your matter as signed.

03 For a customer-only copy, keep the optional sharing choice unticked. Open the additional sharing section only if you intend to share the cleared copy with authorised Will writers in your current firm. No email or SMS is sent automatically.

04 Upload once. The file first enters a separate private scanning zone. You cannot open, download or share it while scanning is pending. Check Quarantine & scan status if you leave the page. A threat, skipped scan, unsupported or password-protected file, scanner failure or unavailable result keeps it blocked; there is no promised completion time.

05 After a completed clean scan, store the cleared file using Check scan and store if clean if it was not accepted automatically. The original uploaded bytes and fingerprint are preserved in private firm storage and independent backups. A clean malware scan does not establish that the document is legally valid or free of every possible threat.

06 Use Share with my firm or Restrict to me to control future firm downloads of your signed copy. Previously downloaded copies cannot be recalled. Existing historical copies require scanning before download; scanning adds evidence without replacing the original record.

07 Keep the original signed Will in a safe place and record its location through the separate original-storage process. The uploaded copy is not an executor access grant or a substitute for probate requirements.

Keep a private signed Will copy

Before you rely on this

Private to you describes application access. Designated infrastructure administrators and the independent recovery process still hold protected storage/backup authority; this is not end-to-end encryption using a key held only by you.

New uploads remain paused until the operator verifies dedicated firm storage and the live malware scanner. Unaccepted quarantine objects expire separately from accepted documents. Do not upload a private recovery key or passphrase.

Open in YourLegacyWill

Open private documents
https://yourlegacywill.com/vault

06 / HOW TO

Review a Will prepared from your firm’s template

Your writer can reuse approved firm wording with the answers saved on your existing matter.

01 Complete your original questionnaire and answer any follow-up questions honestly. A firm template reuses available saved names, addresses, appointments and wishes; it does not infer complex gifts or missing instructions.

02 Read the exact draft shared by your writer and ask about any wording you do not understand. Changing your answers or the draft requires fresh review.

03 Confirm that the professionally approved version reflects your wishes. A template, AI suggestion, preview or editable Word copy is not a signed Will. Follow the firm’s separate signing and witnessing instructions.

Before you rely on this

The firm’s reusable source wording and internal review references are private to its authorised writers. You see your own shared draft, not another firm’s template library.

Your saved matter, tenant and account links stay unchanged. The platform does not send a template upload or its text to AI automatically.

Open in YourLegacyWill

Review your draft
https://yourlegacywill.com/drafting

07 / HOW TO

Complete your Will instructions one topic at a time

A calmer six-section journey keeps the current decision in focus and asks relevant follow-up questions.

01 Begin with Getting started: where your Will applies, age, understanding, free choice, permanent home and any help you need. Choose Unsure when appropriate; these answers do not establish legal capacity or suitability.

02 Continue to You and your family for your name, birth date, address, relationship, children and dependants. Add people once, open one person’s details at a time, and reuse them when choosing executors or beneficiaries. Recording a person does not appoint them or give them an inheritance.

03 Choose your first-choice and replacement executors, then check their willingness. In Inheritance wishes, answer the estate questions before recording shares. Only relevant scope follow-ups appear. Record each main beneficiary on a separate page and add a reserve.

04 If someone may need protection, the journey separates family arrangements, individual inheritance plans, age and entitlement, trustees, fallbacks and confirmation. Changing a parent answer does not erase saved trust instructions or affirmative follow-ups. Ask your adviser to resolve any conflict.

05 Use Continue to check the current topic, Back to revisit it, or Leave this for later to save an incomplete answer. Incomplete topics remain listed at final review and cannot bypass the existing submission and professional-review checks. Why we ask opens only when you need more explanation.

06 Use Save and exit for a break and wait for a confirmed save. Returning to saved instructions resumes a topic in the saved section; reloading the same topic link keeps that topic where available. Browser links contain only a topic identifier, never your answers.

Complete your Will instructions one topic at a time

07 At Review your answers, open any outstanding topic directly, inspect the full saved answers and professional checks, read the service assessment, and confirm your instructions. Completion is not legal approval, a signature or an agreed price.

Before you rely on this

No saved answer, original account/matter link, legal rule or review requirement is removed by the new layout. Your firm’s branding remains in the customer workspace. The progress indicator measures completed sections; additional relevant topics can change a section’s topic count.

If saving fails or another session changed the matter, navigation still pauses to preserve your answers. Follow the existing recovery and reload controls. The new journey is available after its AWS release is deployed.

Open in YourLegacyWill

Open your instructions
https://yourlegacywill.com/

08 / HOW TO

Use the consistent questionnaire and workspace layout

Shared typography keeps questions, guidance, buttons and headings readable across the app.

01 Use the question label to identify the answer requested. Open Why we ask for its explanation; each spouse-name field has one guidance panel.

02 Follow the same heading, body-text and control styles across customer screens, help, documents and support. Firm branding changes the logo, display name and approved accent colour, while the app keeps a consistent readable font.

03 Use your browser’s zoom if you need larger text. Layouts adapt to smaller screens without changing your saved answers or permissions.

Before you rely on this

Actual legal documents and downloaded PDFs keep their separate document typography and signing requirements. This appearance change does not amend a saved Will or legal approval.

Open in YourLegacyWill

Continue your questionnaire
https://yourlegacywill.com/

09 / HOW TO

Read your firm’s branded quotes and invoices

Your firm’s identity and agreed prices appear on its client billing documents.

01 Open My invoices and choose the correct quote or invoice. Check the issuing firm, recipient, services, amounts, tax, due date and any instalments.

02 New documents display the firm’s saved logo, name and colours, with its legal seller and contact details when configured. Download the PDF or permitted recorded-payment receipt from the same document.

03 Read the payment instructions and confirm unusual or changed bank details independently with your firm. Downloading a PDF does not pay an invoice.

04 Contact the firm about a correction, payment or price change. Existing issued documents retain the identity and agreed prices they were issued with; later branding or price-list changes do not rewrite them.

Before you rely on this

A firm’s service charges are separate from its YourLegacyWill platform subscription. No invoice is emailed automatically by these controls.

Legacy documents without a saved branding snapshot retain their original firm name. A payment record is a manual ledger entry, not independent confirmation of bank or card settlement.

Open in YourLegacyWill

Open my invoices
https://yourlegacywill.com/finance?view=customer

10 / HOW TO

Prepare both LPA forms and fee-help papers

Reuse your own information, confirm the official details and obtain professional review before downloading unsigned OPG forms.

01 Open LPA preparation. Choose Start using my selected Will details to copy your own selected matter, or start a separate blank preparation. Names, addresses and date of birth are copied for checking; attorneys, witnesses, certificate providers and eligibility are never chosen automatically.

02 Complete the financial and/or health questionnaire and People and eligibility. Check every appointment, replacement, notice recipient and treatment choice yourself. Existing Will roles do not establish LPA eligibility.

03 Open Official form details and enable preparation. Copy saved names and addresses, then correct first names, surnames, address lines and postcodes. Check multi-part surnames carefully. Confirm the structured details, applicants, correspondent, contact methods and intended payment route.

04 For LPA120, select the requested exemption, remission or hardship route. Record the required benefits or all gross annual income categories and intended declarant, and prepare the actual evidence. Universal Credit is not automatic exemption. OPG makes the fee decision.

05 Save and send your instructions for professional review. Requested corrections or later source changes require fresh confirmation and review. Your reviewer’s private notes remain private; shared feedback and document-generation events appear in your case history. No automatic email notification or response deadline is promised.

06 After clearance, open Official outputs and download LP1F, LP1H and, where reviewed, LPA120. The packs retain all official pages and include necessary continuation or additional signature pages. They remain editable, unsigned, uncertified and unregistered.

Prepare both LPA forms and fee-help papers

07 Follow OPG’s current physical signing order, eligible-witness and certificate-provider requirements, notices and registration process. For health treatment, sign only the saved option A or B after checking it. Leave OPG-only fields for OPG. Keep evidence and signed originals separately.

Before you rely on this

The app does not register an LPA, collect a payment, make a capacity finding, sign or witness for anyone, or grant a fee reduction. Official templates and law must be checked again at the professional handoff.

A copied Will source remains linked to the original matter. Refresh changed source details, check appointments and structured formatting, save and obtain a fresh review. PDFs with superseded source or review data are no longer downloadable through the workspace.

The current LPA120 injury-damages wording contains a conflict with its guidance. That route requires a recorded professional resolution with OPG before preparation. A hardship pack includes a covering request; it does not assert exemption or remission.

Open in YourLegacyWill

Open LPA preparation
https://yourlegacywill.com/lpa

11 / HOW TO

Prepare your Letter of Wishes

Give non-binding guidance alongside your existing Will without changing its gifts or appointments.

01 Open Letter of Wishes and select your original matter. Your saved name, address, funeral preference and general wishes are reused for checking; this never creates another account or moves your matter.

02 Add guidance about personal items, pets, digital memories, guardians, executors or trustees, and explain your reasons where helpful. Do not enter passwords, private keys or account access codes. Gifts, guardian appointments and trust powers must be dealt with in the appropriate legal document.

03 Confirm these are your own wishes and you understand the letter is non-binding, then save a version and submit it. A writer’s suggested version needs your own confirmation and a fresh saved version before submission.

04 Read the writer’s exact-version review and any requested changes. When satisfied, explicitly accept that approved version. Shared notes and decisions appear in the history; these actions do not send email automatically or promise a response date.

05 Download the unsigned final letter after professional approval and your acceptance. Sign and store it following your adviser’s instructions, keep it with the relevant papers and tell your executors where to find it. Review it when circumstances change.

Before you rely on this

A Letter of Wishes does not amend or override a Will or trust, create gifts, appoint an executor or guardian, or confer additional trustee powers.

New letter versions, changed Will information, requests for changes or withdrawn approval require fresh review. Superseded PDFs cannot be downloaded through the workspace, although previously printed or downloaded copies cannot be recalled.

Output is retained in configured private document storage with a cryptographic integrity seal. Downloading or signing the letter does not execute a Will.

Prepare your Letter of Wishes

Open in YourLegacyWill

Open Letter of Wishes
https://yourlegacywill.com/wishes

12 / HOW TO

AWS testing without a daily time limit

The operator controls when the AWS development app starts and stops.

01 From 3 November 2026, the previous daily test allowance and session countdown are suspended until further notice. A saved questionnaire does not expire when the old test allowance would have ended.

02 Wait for All answers saved before closing a page. Signing out ends your own sign-in session; it does not stop the server or delete your saved instructions.

03 The independent backup window starts at midnight Europe/London. The app may pause while the backup captures a consistent copy, then reopen with the same data. Your firm checks completion.

04 After the native shutdown update is deployed, an operator Stop keeps the AWS app and database off until the operator explicitly resumes them. The midnight backup window does not reopen a workspace held off this way. Saved work and existing recovery copies remain; wait for your firm to confirm the service is available. Signing out alone never requests a server shutdown.

Before you rely on this

An operator can still stop the app for maintenance or an incident. A backup alert is investigated by the operator. The existing Sites service stays live.

While a checked update is applied, the app may pause. The operator finishes the update before reopening the app. Your saved matter remains retained. Do not create another account or duplicate questionnaire to work around a temporary service outage.

A normal operator restart resumes the same retained application and database. You should reopen your existing matter when the service is ready; it does not require a new questionnaire or recovery-key unlock.

13 / HOW TO

Saved work when AWS testing pauses

Your saved instructions stay in the retained workspace; independent backups run at midnight.

01 Wait for All answers saved before closing your questionnaire. On an ordinary AWS test stop, the database and documents are retained. The next start reopens that workspace without restoring an older copy.

02 The independent backup window opens at 00:00 Europe/London, including British Summer Time. The existing five-minute watchdog starts the backup within that window. Your firm checks its completion.

03 A daytime stop is not a new independent backup. Changes since the last verified copy remain in the retained workspace until the next successful nightly backup.

04 The operator investigates overdue backup alerts. Saved changes since the last successful copy remain at risk until a new independent backup completes; a saved answer is not a backup certificate.

Before you rely on this

Nightly backup completion and a successful full restore are separate checks. A saved answer or stopped server does not certify a restore.

Replies, ticket status and estimated dates appear in the app. Support ticket emails are not sent.

14 / HOW TO

From saved answers to your draft

Your Will writer can reuse your existing questionnaire to prepare and coordinate reviewed drafts.

01 Complete and check your existing instructions. You do not need to answer another questionnaire for guided drafting. Tell your firm when your circumstances or wishes change.

02 Your firm can suggest its reviewed templates and clauses from those saved answers. Missing information or conflicting clause choices needs attention. A suggestion is not approval of your Will.

03 If your firm coordinates mirror Wills, each person keeps their own account, matter, answers, document versions and acceptance. Coordination does not let either person read the other Will.

04 Read the exact draft shared with you and use the existing comments, change-request and acceptance controls. Your acceptance applies only to your own version.

05 An edit to your partner’s draft does not change yours. Your writer must check each person’s intended provisions separately. New versions still require professional review and your fresh acceptance.

Before you rely on this

No beneficiaries, percentages or personal answers are copied between matters. Coordination creates no shared login, joint approval, signature or witness record.

Only authorised firm Will writers see the coordination details. Your own document remains subject to the existing access and download checks.

No notification email or completion date is automatically provided. Contact your firm using the agreed route for urgent questions.

15 / HOW TO

Discuss a clause and track its resolution

Keep questions linked to the exact saved wording shared for your own matter.

01 Open Draft review, choose your matter and read the shared draft. Select Discuss this wording beside a clause, or choose Whole draft. Enter your question and choose Open discussion.

02 Shared discussions are visible to you and your Will writer. Staff-only notes stay private. Saved visibility and messages cannot be changed.

03 Use Open, Resolved or All history. Expand Exact wording being discussed to check the excerpt and version. Earlier threads keep their original wording while a new draft is private.

04 Reply to an open thread. You can resolve or reopen one you started, with an outcome or reason of at least ten characters. Your Will writer controls resolution of threads they started.

05 Open questions block approval and signing preparation across versions. Resolution does not approve the draft: fresh professional approval and your acceptance are needed. Use Document drafting for copies; the older PDF button is blocked because it cannot reproduce edited clauses.

Before you rely on this

Completed matters keep discussions read-only; ask your firm for an amendment matter. Comments do not edit, sign or witness a Will. Previously printed or downloaded copies cannot be recalled.

No notification email or completion date is provided. Use your agreed contact route for urgent questions. Never include recovery files, passwords or codes.

Unresolved questions survive new versions. If retained history reaches capacity, ask the firm for help.

16 / HOW TO

Understand the template behind your draft

Your Will writer may start from a professionally reviewed firm template, then adapt the saved draft for your wishes.

01 Open Draft review and read the exact version shared for your own matter. If a firm template was used, its name and version appear with the draft. Adapted means wording, clause choices or order changed for that saved version.

02 Check the complete wording even when a template was used. Template approval is not your acceptance and does not sign or witness the Will. Accept or request changes using the existing exact-version review controls.

03 If the template or one of its clauses is retired, further release is blocked. Your Will writer must prepare and review a new available version. The saved history remains retained.

Before you rely on this

You cannot access the firm template catalogue, edit its wording or see its internal review reference. Your draft only shows the source template label and version.

These actions do not send notification email or promise a completion date. Copies already downloaded or printed cannot be recalled.

Open in YourLegacyWill

Review your shared draft
https://yourlegacywill.com/drafting

17 / HOW TO

Review your professionally prepared draft

Review the exact version shared by your Will writer before signing preparation.

01 Open Draft review from the menu and choose your existing matter. Only your own matters are available. A draft remains private until your Will writer approves and shares it.

02 Read every clause. Enter your feedback and confirm that you checked this exact version. Choose Confirm this reflects my wishes or Request changes. This does not sign or witness your Will.

03 A changed instruction, retired clause, withdrawn review or new version removes the earlier approval. Review the new version when your Will writer shares it.

04 Create a review PDF or, when both exact approvals and the existing matter review are valid, a signing-preparation PDF. Each copy is retained in configured document storage and checked before download.

05 Follow your adviser’s physical execution instructions. Keep the original signed Will and its execution evidence separately. The app does not certify legal validity or execution.

Before you rely on this

This first workspace supports England and Wales Wills. LPA form preparation is available through the separate reviewed LPA workspace; this Will draft does not automatically approve legal clauses.

Changes requested here are visible to your Will writer; there is no automatic email notification or promised completion date. Professional internal review notes are not shown.

The Word editing facility is private to Will writers. Withdrawn or superseded copies cannot be downloaded again through the workspace, but a file already downloaded or printed cannot be recalled.

Saved draft versions and approval history must be included in recovery checks. Keep using the matching recovery instructions; never send a recovery key or passphrase to support.

Review your professionally prepared draft

Open in YourLegacyWill

Review a shared draft
https://yourlegacywill.com/drafting

18 / HOW TO

Email invitations and test restrictions

The primary AWS app supports live email; separate test environments stay restricted.

01 On yourlegacywill.com, authorised invitations and notifications use the platform’s configured sending service after live email has been activated by the operator. Creating an invitation and sending its email remain distinct actions.

02 If a test-recipient restriction is shown, no email was sent to the provider. Use the private invitation link or contact the firm; never change the customer email to bypass the restriction.

Before you rely on this

Provider acceptance does not prove inbox delivery. Saved account, matter and executor links are unchanged. Failed or uncertain messages are not automatically replayed when live email is enabled.

19 / HOW TO

Follow your questionnaire and matter progress

See your place in the questionnaire and the stages your matter goes through with your adviser.

01 The bar above your questionnaire shows the sections ready to check, your current section and the topic within it. Select a section to return to it. Conditional questions can change the number of topics as you answer.

02 Progress reflects the answers currently on screen. If Unsaved changes appears, wait for All answers saved before leaving. A full questionnaire bar means the answers are ready to check; it does not submit, approve or sign your Will.

03 Open My matter to see the recorded timeline: Instructions, Submitted, Drafting & review, Client approval, Ready to sign, Signing recorded and Safely stored. It stays visible while you look at documents, instructions and activity.

04 If changes are requested, the timeline returns to Instructions for fresh review. Specialist advice and a review due have their own attention flags. A review due remains associated with the stored Will; earlier records stay in the matter history.

05 Your team records signing evidence and the location of the original. Downloading a PDF or completing an AI review does not advance those stages. Contact your adviser if the recorded stage needs updating.

Open in YourLegacyWill

My questionnaire
https://yourlegacywill.com/

My matter
https://yourlegacywill.com/portal

20 / HOW TO

Sign in and sign out safely

Use the sign-in and sign-out controls in your workspace.

01 Open https://yourlegacywill.com and choose your customer, Will writer or firm owner sign-in page. The protected sign-in service uses the YourLegacyWill logo and a separate Sign in or Create your account screen.

02 Already registered? Choose Sign in and keep using your original email/password, Google or Microsoft account. New here? Choose Create an account, use the email your firm invited, verify it if requested, and then accept your firm’s invitation. Creating an identity does not grant access to another firm or matter.

03 Microsoft sign-in is available alongside Google and email/password. Work or school accounts may also require your organisation’s approval. Do not create a second account to change sign-in providers; contact your firm if your existing matter is missing. Your firm’s branding appears in its authorised workspace; the shared identity screen uses YourLegacyWill branding.

04 Before signing out, wait for All answers saved. Use the Sign out button rather than a saved logout link. The app ends its local session only after a protected submission from this site.

05 With JavaScript available, the app continues to the identity provider to finish signing out. If a completion page appears instead, select Finish signing out of the identity provider. Signing out clears temporary device storage; confirm your answers have saved first.

Before you rely on this

This protection is available only after the security release is deployed to the host you use. A GET logout link has no sign-out effect after that release.

A different sign-in environment must not automatically merge accounts or grant access through a matching email address. Contact your firm if your original matter is not available; do not create duplicate matters to work around it.

Sign in and sign out safely

Open in YourLegacyWill

Open sign in
https://yourlegacywill.com/signin

21 / HOW TO

Record different inheritance arrangements for each beneficiary

Use the same questionnaire to record separate people, asset interests, trust wishes and fallbacks for specialist review.

01 In Inheritance wishes, add affected beneficiaries or future classes in Beneficiaries, children and inheritance protection. Use Record individual beneficiary arrangements when people need different terms. You can also select people from the You and your family register.

02 For each arrangement choose the person and asset scope: residue, home interest, specific gift or another arrangement. One person may have more than one arrangement. Keep main gift percentages separate; for home occupation, separately record the intended capital destination.

03 Record the proposed arrangement, access age, entitlement, death before you, death before entitlement and the end of any lifetime interest. Choose advice needed or Does not apply deliberately where appropriate. An age or trust label alone does not create protection or establish tax treatment.

04 Select proposed trustees for each arrangement, or ask for help choosing them. Record support needs and interim payments. Put names, family branches and detailed wishes in the private fallback and instruction notes; your authorised reviewer sees these in the saved instructions and specialist briefing.

05 Check every affected beneficiary has a linked arrangement, including a proposed exclusion if relevant. If a person or trustee is removed, resolve the missing reference before submission. Earlier shared choices stay saved for reference; switching does not copy them into the individual plans. Returning to shared questions requires confirmation and clears individual arrangements only from the current draft.

06 Confirm the complete instructions and wait for the saved status. Changes create a new saved answer version and need fresh review. If AI is authorised, its displayed summary includes coded arrangements, age categories, entitlement and fallback choices; names, addresses, dates of birth and free-text notes are excluded.

Record different inheritance arrangements for each beneficiary

Before you rely on this

Available after the AWS release is reviewed and deployed. Existing shared-plan records continue to load. Saved historical versions retain their original answers.

Your adviser keeps a private audit of AI suggestions, why they were made and the decisions taken. Ask for an explanation of any proposed change; only questions deliberately shared by the adviser appear in your portal. This route produces a specialist briefing, not a Will for signature. The AI summary cannot read the private notes or the full document. Your firm must separately review those details, agree the work and confirm any expected completion date.

Open in YourLegacyWill

Open the questionnaire
https://yourlegacywill.com/

Review the saved matter
https://yourlegacywill.com/portal

22 / HOW TO

Find your way around your firm’s workspace

Warm white, charcoal and restrained headings keep your instructions, adviser and documents easy to find.

01 Use Menu in the compact header to open My instructions, My matter, My inbox or My documents. On smaller screens, use the questionnaire step control to move between sections. Buttons, labels and saving messages identify the action; colour alone does not indicate progress or an error.

02 Your firm may show its own name, logo, welcome message and a single customer accent. Look for Powered by YourLegacyWill. Branding comes from your selected, authorised firm and may also appear on a valid customer invitation.

03 Keep using the same account and sign-in method. Changing a logo or accent does not link another account, move a matter, grant access or change your saved answers. If you work with more than one firm, check the selected firm before continuing.

04 If a welcome or logo looks unfamiliar, contact your firm through your established contact details. Do not send passwords, identity documents or Will contents in a support report.

Before you rely on this

This design is available after its AWS release is approved and deployed; the existing Sites service keeps its current appearance. Firm branding becomes visible on your next page load after the firm owner saves it.

Shared sign-in, existing emails and signed PDF documents retain their existing identity. Custom website addresses are separate setup work. Branding changes do not send an email or promise a completion date.

Open in YourLegacyWill

Open your instructions
https://yourlegacywill.com/

23 / HOW TO

Understand your Will service and quotation

One questionnaire identifies relevant follow-up questions. Your firm confirms the work and price.

01 In Getting started, answer the existing screening questions and choose Unsure where you need advice. Relevant follow-up questions separate gifts, charities, trusts, conditions, vulnerable beneficiaries, business assets and tax planning. Your saved answers are reused.

02 Read the provisional service assessment. Straightforward, additional drafting, specialist assessment and review needed describe possible routes, not a quotation or legal approval. Having children alone does not determine a higher fee. Existing legal referral and signing checks remain.

03 Open My matter, Instructions, to see the saved assessment and linked quotations. Open the quotation in Finance and check the included work, exclusions, expected turnaround, total and stated tax before accepting. An expected date is subject to the dependencies the firm records.

04 If your wishes change, ask your firm to reopen the instructions. A quote based on older answers cannot be accepted or converted into an invoice. Your firm prepares a fresh scoped quotation and you must accept the new work separately. Earlier accepted quotes remain in the history.

05 This assessment and quote acceptance do not sign a Will or take a payment. Safeguarding concerns need private professional attention, rather than a paid package upgrade.

Before you rely on this

This enhancement is available only after its AWS release has been reviewed and deployed. It does not change the existing Sites service. The questionnaire preview uses current on-screen answers; the saved matter assessment also checks the estate assessment.

Understand your Will service and quotation

Your matter assessment is visible to you and authorised staff in your selected firm. Draft quotations are visible only to staff; issued quotations appear in Finance. Issuing a quote creates a portal notice, not an automatic email. No assessment completion date is guaranteed.

Open in YourLegacyWill

Open your saved matter
https://yourlegacywill.com/portal

Review quotations
https://yourlegacywill.com/finance

24 / HOW TO

Invite an executor and understand access after death

A nomination acknowledgement records willingness in principle; it does not sign or witness your Will.

01 Save your Will instructions and check the first-choice and replacement executor names. Open My executors, choose the correct matter and person, enter their own email address and confirm your consent to contact them and reveal your identity and nomination after sign-in.

02 Select Save and send discreet invitation. No Will contents are attached. Check the saved email status: not sent means email setup is unavailable; accepted means the provider accepted it, not that it reached the inbox; unknown means delivery is uncertain. Check the provider before any explicit retry, which may duplicate an email.

03 The nominated person opens the Executor portal and signs in with the invited verified email. They check the nomination and acknowledge willingness or decline. No customer or staff membership is created and no Will copy is unlocked. Invitations expire after 14 days. Per UTC day, each Will-maker can create up to six nominations and reserve up to ten invitation email attempts in total, with at most three per nomination. Uncertain or reserved attempts may count.

04 Revoke an earlier nomination before replacing it. Changes to the saved Will data revision suspend earlier access and require a new invitation and acknowledgement. A portal change does not amend the legal Will; obtain advice about changing an executor appointment.

05 After a death, the acknowledged executor enters the reported death date and requests firm review. Provide supporting evidence securely through the firm. The firm must independently verify death, identity and authority and approve the exact signed PDF. An uploaded certificate alone never unlocks it.

06 When the portal shows an approved available copy, download the PDF and print it using your PDF viewer. The original location is shown with the release. The stored file is read-only, but downloaded and printed copies cannot be recalled. Probate in England and Wales normally requires the original Will.

Invite an executor and understand access after death

Before you rely on this

This functionality becomes available after its AWS release and additive database migration are verified. It has not been published to the existing Sites service. Your existing customer email or Google sign-in remains in use; this does not introduce executor passkeys.

Nomination and request status are visible in the portals. Request and decision updates do not send automatic emails. Review dates are arranged directly with the firm; no completion date is guaranteed. Ask the firm to reopen a rejected or revoked request if further evidence needs review; this does not automatically restore access. Revocation, a changed Will or execution record, a later recorded signed Will, a changed file version, suspended firm access or an integrity failure can make a previously approved download unavailable.

An acknowledgement does not oblige the nominee to act after death and does not establish the legal validity of a Will. Do not send Will contents, evidence, sign-in codes or private recovery keys in a support report.

Open in YourLegacyWill

Manage your executors
https://yourlegacywill.com/executors

Executor portal
https://yourlegacywill.com/executor

25 / HOW TO

Use your documents and older Wills

In verified AWS firm storage, your documents stay private and older Will copies remain available.

01 Sign in with your existing account and choose the correct firm and matter. Only documents released to you are available; moving a file into archive does not release a draft or change its permissions.

02 Use the normal document download. Generated Will versions, their signature receipts and uploads marked as Will become eligible for instant archive 30 days after each version is stored. You do not need a separate AWS login or a restore request.

03 When an authorised upload form offers Document type, choose Will or signed Will copy for a Will, or Supporting document for other evidence. Keep using the existing document-request and review process.

Before you rely on this

This applies after your AWS firm workspace shows verified storage. The existing Sites service keeps its existing behaviour. Other documents and editable answers are not moved by this Will archive rule.

Archiving keeps the document bytes, original matter links and access checks. It does not delete documents. AWS processes the storage transition asynchronously after the 30-day eligibility date.

26 / HOW TO

Use the correct sign-in for your account

Owner passkeys protect the platform operator account.

01 Keep using the customer email or Google sign-in associated with your invitation. Platform owner passkeys do not change your customer sign-in.

02 If your matter is missing, ask your firm to check your existing account and matter links. Do not create another account or use the platform owner sign-in.

Before you rely on this

An owner passkey does not add a firm membership, merge accounts or grant customer document access.

27 / HOW TO

Keep your account and work safe during hosting changes

Continue using the normal YourLegacyWill site while separate migration testing takes place.

01 Use the address and invitation supplied by your firm. Keep signing in with the same account and method, including Google where you already use it.

02 Wait for Saved confirmation before leaving your instructions. After signing in again, check the selected firm and matter reference before continuing.

03 Do not create a second account to resolve a missing matter. Ask your firm to check the existing account link.

04 A separate AWS test address is being prepared. Use the exact confirmed HTTPS address, including when following sign-in or invitation links. Use it only after a specific invitation; enter fictional examples and keep personal Will details on the normal service. Keep using the existing Sites service for normal work.

Before you rely on this

Historical testing policy, superseded by manual availability from 3 November 2026: The test service closes at its fixed session deadline. An early Stop can take up to two seconds to reach every request. Testing and independent backup jobs share one five-hour allowance per London day from 1 November 2026, including preparation, backup and confirmed shutdown. Another session must wait for those checks to finish. Keep using the normal customer service as usual. An original-data AWS recovery checkpoint passed its independent restore on 31 October 2026. The AWS test address and real sign-ins still need acceptance. Changes made after that checkpoint, including new owner passkeys, need a fresh verified backup before transfer. A successful upload alone does not confirm recovery.

A change of hosting does not itself merge accounts, grant document access or change a Will. Follow your firm’s confirmed instructions; do not send sign-in passwords or private recovery files in chat.

Keep your account and work safe during hosting changes

When invited to check a transferred test record, compare the matter reference, saved answers and earlier documents. Report anything missing or unexpected before continuing.

28 / HOW TO

Use tickets, support knowledge and change updates

Raise a tracked request, understand its priority and follow a reviewed resolution.

01 Select Report issue on the affected page. The report opens in a scrollable dialog with its close and submit controls kept in view. Check the page and workspace section, select the confirmation checkbox, then choose the report type and impact. Add a short Summary and describe expected behaviour and safe reproduction steps in Tell us a little more. Never include names, email addresses, Will contents, credentials, documents or private recovery material.

02 Choose the impact: P1 Urgent for suspected exposure or complete service loss, P2 High for a blocked core workflow, P3 Normal for ordinary issues or features, or P4 Low for minor presentation issues. After Submit report, the confirmation shows your numbered YLW ticket reference and initial priority. Select View tickets and knowledge to follow the report. If submission fails, correct the message shown; your entered details remain available to retry. Initial priority is provisional; support can change it during triage.

03 Open Support. Filter open or resolved/closed tickets by priority or type, and search by summary or reference. Resolved tickets are marked Fixed; Closed is the completed review state. Estimated fix dates are targets, not guarantees.

04 Open a ticket for its conversation, status history, shared updates and resolution. Reply with anonymous details. Reporters can reopen their own resolved or closed tickets if a problem remains. Firm owners see reports for their selected firm; other users see their own reports. Switching firm does not grant another firm’s reports.

05 Updates and replies appear in the app only; no ticket email notifications are sent. Private platform-owner notes and personal ChatGPT assessments are never included in customer or firm ticket views. Owner support reviews do not count as customer API usage.

06 Search the support Knowledge base for reviewed resolutions. Only published articles for your audience appear; a closed ticket never becomes shared guidance automatically.

Use tickets, support knowledge and change updates

Before you rely on this

Support tickets, knowledge articles and release notes never grant access to client documents. Use authorised document workflows for legal evidence; keep support examples anonymous.

AI is a troubleshooting hypothesis, not a verified diagnosis. Assessment response storage is disabled, but that setting alone is not a zero-retention guarantee.

Open in YourLegacyWill

Support tickets and knowledge
https://yourlegacywill.com/support

29 / HOW TO

Answer questions from your adviser

Your adviser may share questions to clarify your wishes before drafting.

01 Open My matter, then Your progress. Questions from your adviser appear here after the reviewer chooses to share them.

02 Read the question, enter your reply and select Save reply. Wait for the saved confirmation before leaving. You can update an open reply until the reviewer records a decision.

03 Your reply is linked to this matter. It does not automatically change your Will instructions. Your adviser will tell you if the questionnaire needs updating.

04 An earlier instruction version may be shown beside a question. Tell your adviser if your circumstances or wishes have changed.

05 Your writer may use AI to identify points to discuss. You see only the questions they deliberately share, rather than the internal AI suggestions, audit assessments or client-explanation drafts. A reply does not change your Will answers or approve the document.

Before you rely on this

AI observations and internal reviewer notes are not shown here. Only the question your adviser shares is visible.

The portal does not send an email or SMS for these clarification questions. Check My matter when working through your instructions.

Open in YourLegacyWill

My matter
https://yourlegacywill.com/portal

30 / HOW TO

Ask a question about wills

Use the Will knowledge library for general England and Wales questions, practical examples and linked sources.

01 Choose Will knowledge from your workspace home or menu. Ask a general question or choose Explore the library to browse topics.

02 Search library finds researched guidance without sending your question to an AI provider. Open an article to read the example, questions to establish and original sources.

03 If enabled, select Use AI to explain the sources before asking. Your question and up to three earlier questions are sent to OpenAI; avoid names, addresses and private client details.

04 Read the cited articles. Any interpretation of your example is conditional. Discuss your own circumstances with your firm before deciding what to put in your will.

05 Select New chat to clear the current discussion. The conversation stays in the page and is not saved as part of your matter.

Before you rely on this

Initial content is researched guidance awaiting qualified professional validation. It does not certify your will or replace your firm’s review.

This library covers England and Wales. AI explanations pause if the connection is unavailable or the edition is overdue for review; source articles remain available.

Open in YourLegacyWill

Open Will knowledge
https://yourlegacywill.com/knowledge

31 / HOW TO

Start here: your customer workspace

Your firm invites you to a secure workspace. A CRM relationship or family connection does not give another person access to your account.

01 Open the link supplied by your firm, or choose Have an invitation code on the sign-in page and paste the code from the email. Use the exact email address that received the invitation.

02 Choose Create account with email, Continue with Google or Continue with Microsoft using the invited address. A provider sign-in creates your YourLegacyWill account without a separate app password; complete any requested email verification. For email/password, verify the email from the sign-in service, then return to the invitation and sign in again. Keep using the same sign-in method; accounts are not automatically merged.

03 Accept the invitation after signing in. For a linked client invitation, the firm-selected matter, your first matter or an explicitly requested separate new Will opens in your workspace. A separate Will starts with blank answers and keeps your earlier Wills and documents unchanged. Choose My matters in the menu to return to the correct reference. Check the firm and matter reference, then open My instructions. Use My matter to follow review progress.

04 Use Menu for your inbox, appointments, invoices, documents and review preferences. When finished or changing accounts, choose Sign out and wait for the welcome screen.

Before you rely on this

A suspended firm cannot access its workspace until the platform restores access; its records are retained. Ask your firm if an invitation has expired or your account is linked to the wrong email. Signing in alone does not enrol you with a firm.

If the firm’s licence expires or access is revoked, the app blocks tenancy access. Contact your adviser; do not create another account to work around it.

Start here: your customer workspace

Open in YourLegacyWill

Customer sign in
https://yourlegacywill.com/signin

Firms & invitations
https://yourlegacywill.com/workspaces

32 / HOW TO

Prepare for the Will questionnaire

Gather what you know before starting, and use your adviser to resolve anything uncertain.

01 Have your personal and contact details ready, including where you live and the jurisdiction relevant to your instructions. Tell your adviser if Scotland, Northern Ireland or another country may be involved.

02 Think about your family and dependants, people you may appoint as executors or guardians, and those you want to benefit. Check names and contact details carefully.

03 Prepare an outline of property, savings, investments, debts, business interests, overseas assets and any existing Wills or arrangements. An asset’s ownership can affect whether it passes under a Will.

04 Consider specific gifts, the remaining estate, what should happen if someone dies before you, and arrangements for children or vulnerable beneficiaries.

05 Use the question explanations and help text. Raise uncertainties with your adviser rather than treating a general explanation as advice for your circumstances.

Before you rely on this

The questionnaire records instructions; it does not by itself create an executed, legally effective Will.

Complex families, foreign connections, trusts, capacity concerns and potential disputes need professional consideration.

Open in YourLegacyWill

My instructions
https://yourlegacywill.com/

33 / HOW TO

Save answers and resume safely

The Will questionnaire saves changes as you work and shows the saving state. Confirm that saving has completed before leaving.

01 Enter an answer and watch the saving indicator. Wait for confirmation that the change has been saved before closing the page or moving to another device.

02 Continue through the questions at your own pace. Sign in to the same account and selected firm to resume the server-saved answers.

03 If the connection fails, keep the page open and follow the recovery or retry prompt. The app can keep an encrypted recovery copy in this browser when supported.

04 If a conflict says the record changed elsewhere, compare the versions and follow the offered recovery process. Avoid editing the same questionnaire in several tabs or devices simultaneously.

05 If recovery is offered, check that it is for the expected matter and review the recovered answers before submitting them.

Before you rely on this

A browser recovery copy is not a substitute for a completed server save or the firm’s backup arrangements. Clearing browser data, using private browsing or changing devices can remove that local copy. Ask your firm about independently tested server recovery. A failed export must be resolved and a complete restore tested before recovered access is promised. During a planned migration, keep using your original account and check the expected firm and matter after access is restored.

Do not assume the Will questionnaire autosave applies to every other form. Use the explicit Save button where a screen provides one.

Use a trusted device and sign out when finished. Do not send recovery keys, passwords or sensitive instructions by ordinary email.

34 / HOW TO

Submit instructions and follow professional review

Your adviser reviews your instructions before a draft is released for you to see.

01 Review the questionnaire and complete the required questions. Use Submit for review when the app offers it.

02 Open My matter to see the current status and messages. While review is in progress, the app may lock editing to preserve the version being checked.

03 If your adviser asks for changes, use the permitted amendment action, answer the request and resubmit. Tell the adviser about changes that arise after submission.

04 When the firm releases a draft, open the permitted document and check names, appointments, gifts, beneficiaries and any conditions carefully.

05 Raise corrections through My inbox. Do not rely on an older PDF after a new version is prepared.

Before you rely on this

A draft may exist internally before you can download it. This is an intentional professional review gate.

A draft PDF, AI check, portal confirmation or payment receipt does not complete Will signing and witnessing. Follow the firm’s execution instructions and keep the original as directed.

Open in YourLegacyWill

My matter
https://yourlegacywill.com/portal

My inbox
https://yourlegacywill.com/communications

35 / HOW TO

Send a secure message to your firm

Use My inbox for questions and follow-up messages linked to your work with the firm.

01 Open My inbox and choose the relevant conversation or permitted new-message action.

02 Check that you are in the correct firm and conversation before writing. Keep the message focused on the issue you want the adviser to resolve.

03 Send the message and look for confirmation. Reopen the thread to check that it appears before sending a duplicate.

04 Return to the inbox for replies. If the matter is urgent, use the firm’s agreed urgent contact method.

Before you rely on this

A portal message is not proof that the adviser has read or accepted an instruction.

SMS and external email availability depend on the firm’s configured service. Do not assume every portal message also generates a text or email.

Open in YourLegacyWill

My inbox
https://yourlegacywill.com/communications

36 / HOW TO

Book, change or cancel an appointment

The booking screen offers the adviser, service, location and times configured by your firm.

01 Choose Book an appointment, then select an available adviser, service and location.

02 Choose a displayed time, check the London-time appointment details and provide the requested preparation information.

03 Confirm the booking and check the appointment record. Use the calendar download if offered to add it to your own calendar.

04 For a future booking, use the available reschedule or cancel action and confirm the change. Contact the firm if the appointment has already started or the action is unavailable.

Before you rely on this

An ICS calendar download adds a calendar record; it is not a live two-way calendar connection.

Automatic external reminders and live Microsoft/Google conflict checking are not guaranteed by the current booking workflow.

Open in YourLegacyWill

Book an appointment
https://yourlegacywill.com/book

Appointments
https://yourlegacywill.com/appointments

37 / HOW TO

Find documents and answer document requests

Your documents area shows requests and copies the firm has permitted you to access.

01 Open My documents and select the relevant request or released file. Read the request instructions before uploading anything.

02 If uploading is enabled, submit the supported file type within the displayed size limit. Check that the upload completes.

03 Download only the version your adviser has released for your review or records. A file may be withheld while review, payment conditions or release checks are outstanding.

04 Ask your adviser where the original signed Will is held. Keep that information separate from any downloaded copy.

Before you rely on this

Uploads may be disabled while the firm’s scanning and operational controls are being completed. Contact the firm for its approved alternative.

A stored PDF is not automatically the original signed Will. Your family relationship to another customer does not grant access to their documents.

Open in YourLegacyWill

My documents
https://yourlegacywill.com/vault?view=customer

38 / HOW TO

Review quotes, invoices, instalments and receipts

My invoices shows your firm’s issued quotes and invoices. Draft invoices stay internal.

01 Open My invoices and select a document. Check the seller, service, amount, tax, due date and payment terms.

02 For a quote, use Accept quote only after checking its terms. Quote acceptance is separate from paying an invoice.

03 For an invoice with a deposit or instalments, review the plan and remaining amounts. Recorded payments are allocated to the earliest instalment first.

04 Follow the firm’s payment instructions. The current client finance workflow uses manually recorded payments; Stripe invoice checkout is not yet enabled.

05 After the firm records a received payment, download the payment record or receipt. Ask the firm to investigate any missing or incorrect entry.

Before you rely on this

A manual receipt records what the firm entered; it does not independently verify a bank transfer or card settlement.

Contact the firm about refunds or corrections. A reversal entry in the app does not itself send money back.

Open in YourLegacyWill

My invoices
https://yourlegacywill.com/finance?view=customer

39 / HOW TO

Report life changes and manage review preferences

Your instructions may need professional review after changes in your family, wishes or assets.

01 Open Review preferences to check the review contact choice associated with your matter.

02 When a review request is available, say whether anything has changed. Describe relevant changes clearly rather than selecting no changes to dismiss the request.

03 Changes may create a linked review matter while preserving the original record. Follow the adviser’s instructions for the new review.

04 Use Book an appointment or My inbox if you need advice before the next scheduled review.

Before you rely on this

A no-changes response is your report, not a professional confirmation that the existing Will remains legally valid.

Choosing review contact preferences does not guarantee external delivery or automatically update a signed Will.

Open in YourLegacyWill

Review preferences
https://yourlegacywill.com/reviews?view=customer

40 / HOW TO

Prepare lasting power of attorney instructions

The LPA section helps collect and review preparation instructions for England and Wales.

01 Open My lasting powers of attorney and read the preparation guidance.

02 Enter the donor, proposed attorneys, replacement arrangements and other requested information. Use the Save actions provided.

03 Submit the prepared instructions for professional review when available and answer any follow-up questions.

04 Follow the firm’s separate instructions for official forms, signing, certificate-provider requirements and registration with the Office of the Public Guardian.

Before you rely on this

The app’s instruction PDF is not a registered LPA. It does not complete official signing, certification or registration.

Open in YourLegacyWill

My lasting powers of attorney
https://yourlegacywill.com/lpa

41 / HOW TO

Resolve common access and saving problems

Check the selected firm, account and record status first.

01 If you cannot see a matter, confirm the selected firm and that you used the invited email. Ask the firm to check your customer membership.

02 If a form will not save, read the validation message, complete required fields and check the saving indicator or explicit Save result. Keep unsaved text available while resolving the problem.

03 If a document is missing, ask whether it has been reviewed and released and whether any payment condition applies.

04 If a receipt appears wrong, provide the invoice reference and payment reference to the firm. Never send card details or passwords in a support message.

05 For legal questions or corrections, contact your firm. For a new firm tenancy, the platform contact is Join@yourlegacywill.com.

Before you rely on this

Do not delete an account, clear browser storage or create duplicate records as a first response to a saving issue. Your adviser can help establish which version is current.

42 / HOW TO

Understand AWS backups and recovery

Keep using your existing account while the hosting transition is verified.

01 Continue using the confirmed live address and your existing email or Google sign-in. A backup or hosting change does not create a new account or alter your matter links.

02 Check the firm and matter reference after signing in. Report missing documents or answers to your firm before making duplicate records.

03 Your firm can maintain encrypted document copies in private AWS S3. Ask the firm to verify a complete recovery with its independently saved recovery key before relying on those copies.

Before you rely on this

Customers do not configure AWS credentials, KMS keys or platform backup jobs. Never send passwords, recovery keys or passphrases to support.

A successful upload is not a complete restore. Working records remain readable by the authorised application; primary customer data is not end-to-end encrypted.