



# WHY HAVE A PROFESSIONAL WILL

## Why have a professional will?

A professional will is useful for many reasons. Who would want to be the client who is contacted by a bereaved or distressed relative expanding that your therapist was dead or seriously ill?

Although professional wills are not legal documents, they do offer practical and safe procedures in the event that a therapist is unable to practice or dies.

By making a professional will and appointing an executor to implement your wishes, you have peace of mind that you are offering your clients the best possible service.

## A professional will also:

- Offers support for the client should the therapist die or become unable to work
- Provides continuity of any issues around safeguarding
- Helps ensure that personal data is secured and handled appropriately
- Reassures the therapist's next of kin that a professional and competent individual/s is/are handling enquiries from clients
- Helps ensure that where possible, clients are referred to other professionals who can support them and help where necessary to process any loss around the therapist's death or prolonged absence
- Helps when it is needed to liaison with professional bodies and insurance companies in closing down a practice

## The executor may also need to consider:

- Outstanding payments for premises
- Outstanding payments for any staff
- Outstanding payments of professional fees such as membership bodies or CPD events and insurance policies
- Payment of utility bills

## How to pick an executor

Usually a practitioner approaches a suitable qualified colleague such as a supervisor and leaves detailed instructions on what to do in the event of death or prolonged incapacity.

It is customary to pay a fee upfront for these services.

## Do I have to inform clients I making a professional will?

Absolutely, as a third party will be handling their data.

If implementing a will, you need to contract with the client for this and get express client permission in writing.

On the next page is a template you may wish to consider when drafting a professional will.

*It is recommended that you take relevant legal or professional advice when considering this element of your practice.*

## Professional Will

I ..... of (address) ..... declare this to be my professional will.

It contains detailed instructions on how to manage my practice should I become unable to through injury, death or any other form of incapacitation.

I acknowledge that this is not a legal document. It provides detailed instructions on how to manage my practice and offer continuing support and care to my clients in the event of my death or incapacitation.

- My ethical body is .....
- My ethical body membership number .....
- Membership number .....
- Details of my insurers .....
- Insurance policy number.....
- Details of supervisor .....
- Contact details of the executor .....

I hereby grant my executor the authority to act on my behalf.

My instructions are:

- To contact clients past and present
- To offer current clients a choice of referral options
- To notify relevant organisations or professional parties
- To store client notes and information appropriately
- To forward notes and details to any new counsellor the client may choose to work with (with the client's express permission).
- To close the practice both practically and financially

Signed

Name:

Date:

Witness signature

Name:

Date: