

# Will and Enduring Power of Attorney Promotion

## Terms and Conditions

### 1. Promotion Details

This promotion provides eligible clients with a discounted fixed-fee package for the preparation of:

- One standard Will; and
- One Enduring Power of Attorney (Property); and/or
- One Enduring Power of Attorney (Personal Care and Welfare),

subject to these Terms and Conditions.

### 2. Promotional Period

The promotion is available for instructions received between 1 July 2026 and 31 July 2026 with the Will being signed by the end of August 2026. The Firm reserves the right to extend, amend, or withdraw the promotion at any time.

### 3. Eligibility

The promotion is available to:

- New and existing clients of the Firm;
- Individuals aged 18 years and over;
- Clients who provide all necessary information and instructions within the promotional period.

### 4. Standard Documents Only

The promotional fee applies only to standard Wills and Enduring Powers of Attorney.

The promotion does not include:

- Complex estate planning advice;
- Testamentary trusts;
- Multiple trusts or companies;



- Relationship property advice;
- Overseas assets or succession issues;
- Business succession planning;
- Capacity assessments;
- Urgent or priority service requests; or
- Any matter requiring substantial additional legal advice.

Where additional work is required, the Firm will advise the client and may charge additional fees at its standard hourly rates.

#### **5. Appointment Requirements**

Clients must attend any required appointments and provide all requested information promptly.

Failure to provide information within a reasonable timeframe may result in the promotion no longer being available.

#### **6. Fixed Fee**

The promotional fee covers:

- Initial instructions;
- Preparation of the relevant documents;
- One round of reasonable amendments;
- Final execution meeting (where required).

Additional amendments or changes requested after documents have been prepared may incur further charges.

#### **7. Independent Advice**

The Firm reserves the right to recommend that a client obtain independent legal advice where required by law or professional obligations. Any costs associated with independent advice are not included in the promotional fee.

#### **8. Verification of Identity**

Clients must comply with any identity verification requirements and provide satisfactory identification documentation if requested.

#### **9. Payment**

Payment is due upon signing of the documents or upon issue of the Firm's invoice, whichever occurs first.



## 10. Non-Transferable

This promotion:

- Cannot be transferred to another person;
- Cannot be exchanged for cash;
- Cannot be used in conjunction with any other offer unless expressly agreed by the Firm.

## 11. Professional Obligations

The Firm reserves the right to decline instructions where:

- There are concerns regarding legal capacity;
- A conflict of interest exists;
- Professional obligations prevent the Firm from acting; or
- The matter is otherwise unsuitable for the promotion.

## 12. Limitation of Promotion

The promotion applies only to legal services expressly stated in these Terms and Conditions. Any additional legal services requested by the client will be charged separately.

## 13. Governing Law

These Terms and Conditions are governed by the laws of New Zealand.

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*"This promotion applies to standard Wills and Enduring Powers of Attorney only. Additional fees may apply where a matter is complex or requires additional legal advice. Eligibility and suitability for the promotion will be determined by the Firm following receipt of instructions."*