



Video Conference Appointment Guide

This guide will help you understand

- the steps involved for our Wills and Estate Planning video appointments
- what you need to prepare for the appointment
- how to access Microsoft Teams for your appointment

Video Conference Appointment Process

Step 1 Request video conference appointment

Request a video conference appointment via our website.

Step 2 Confirm appointment

We will call you prior to your appointment on 02 9240 0701 to book in the appointment, learn more about your situation and help you prepare for your appointment.

Step 3 Initial video conference appointment

You will have your initial video conference appointment with one of our experienced Wills and Estate Planning consultants who will take instructions and draft your document(s). This can take up to 2 hours, depending on your assets and directions.

Note - Video, audio or screen recording is not permitted. Our policies do not allow for any form of video, audio or screen recording. This is to ensure privacy and confidentiality of both you and our staff.

Step 4 Payment

An invoice will be sent to you after the initial video conference appointment before your document(s) are drafted. Payment can be made online. Fees are waived for customers receiving the full Centrelink Age Pension and you'll be required to provide a Centrelink income statement as evidence of your pensioner status.

Step 5 Receive your draft documents for review

The drafted document will be sent to you via email or post for you to review.

> Second appointment

A second video conference appointment may need to take place if additional instructions or advice about your circumstances are required.

Video Conference Appointment Process (Continued)

Step 6 Execute and store your documents

Execute the document(s) by signing it in front of two independent witnesses. This can be done face to face, at either an office location or pop-up location. Specific instructions on how to complete them correctly will be provided to you if you wish to execute them via video conference appointment. Our consultants will also give you advice on how to best store your documents.

Note – Do not pin or staple your original documents together as we need to scan your documents when they are returned to us.



Will Safe secure storage

Customers may choose to store their important documents with us using our Will Safe secure storage. You can find out more about this service [here](#).

What you need

- **A good internet connection** is needed. If you are able to watch a video over the internet, such as on YouTube or Facebook, then your connection will work for a video call.
- **Google Chrome** is our preferred web browser, as this works well with Microsoft Teams.
- **A device connected to internet** such as a computer, laptop, smartphone or tablet.
- **A device** with built-in camera, speakers and microphone.
- **Please sit in a private, well-lit area** where you will not be disturbed. Ensuring your privacy is essential to maintain confidentiality and integrity of your personal information.
- **A video meeting application.** Microsoft Teams is our preferred application. You can join as a guest without signing up, and it works on all devices and operating systems. We may consider other tools should Microsoft Teams be unavailable.

(see the next page for how to access Microsoft Teams >>)



How to access Microsoft Teams:



Microsoft Teams is our preferred application. You can join as a guest without signing up, and it works on all devices and operating systems. We may consider other tools should Microsoft Teams be unavailable.

Compatible devices

All types of computer, laptop, tablet and smartphone devices on iOS, Windows or Android

Do I need an account?

No. You may be asked to sign up on tablet and smartphone devices, but there is a way to join the meeting as a guest.

Do I need to download the app?

No for computer or laptop.
Yes for other devices. You need to download the Microsoft Teams app:



How will I receive the invitation?

You will receive an email with a link to join the meeting. You will be asked to use or download the app if you're using a smartphone or tablet device.

[Join Microsoft Teams Meeting](#)

How to join as a guest without an account on tablet or smartphone

- 1 Download the app to your device.
- 2 Open the link in the email we sent you.
- 3 Select the option to open the app.
- 4 Select the option to continue as guest.
- 5 Turn on your camera: Tap the 3 dots > Share > Start presenting.