



**CUSTODIUS™**

Will Storage Solutions for Lawyers

support@custodius.ca

**THE LAWYERS GUIDE**

# Storing & Registering Wills with Custodius



The only Canadian will registry that offers secure storage of the original paper will and a personal dashboard for easy search and retrieval.



An all-in-one solution that lets lawyers continue to offer a secure will storage to clients while transferring all of the costs, management, logistics, and liability to Custodius.



Custodius is no-cost for lawyers and affordable for clients, making the service accessible to everyone.



# Introducing a no-cost alternative to the expense, burden, and liability of storing original paper wills for clients.

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**7 Ways Lawyers Use Custodius to Reduce Costs and Grow Business**

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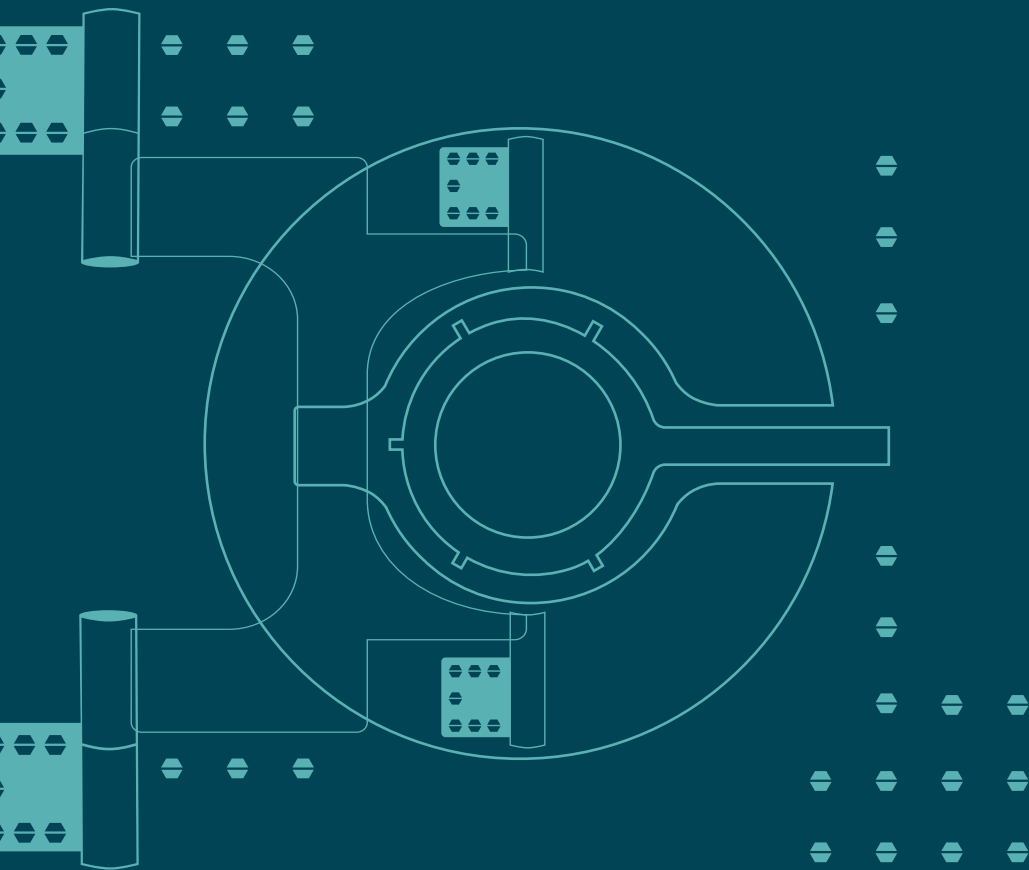
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# 7 Ways Lawyers Use Custodius to Reduce Costs and Grow Business

## 1/ Enhance the value of your will bank.

Custodius frees you from the burdens of storing wills while enhancing your valuable client relationships. Each member lawyer's will bank database remains connected to them, offering a functional and modern solution for preserving and growing the value of their business.

## 2/ Release your firm from liability.

Complete transfer of liability is built into our process. Whether you recommend a new client to Custodius, or transfer your existing will bank to consenting clients, you are relieved of the burden of liability associated with storing these transferred documents for years or even decades from now.

## 3/ Automate future business development.

Custodius sends your clients annual correspondence reminding them to review their estate plan with you when any of the usual triggering events occur or when changes to the law may affect estate plans.

In this way, Custodius offers a tactful and professional means of driving future business back to you, or to the successor lawyer you designate, with no effort on your part.

## 4/ Reduce the costs of will storage immediately and for good.

With Custodius, lawyers can recoup significant savings back to their bottom line each year.

When you consider fireproof cabinets, office space, and clerk time spent performing searches, costs related to will storage easily adds up to thousands of dollars.

With Custodius, you can store 10 wills or 10,000 wills (or more), with no incremental cost as your firm grows.

## 5/ No more responsibility for responding to will search requests.

The Custodius database can be searched by any Canadian Lawyer. If your firm gets a request, your staff can just refer them to Custodius, saving time and reducing your liability.

## 6/ Make your will searches easy and instant.

Custodius provides you with the ability to view every client account, sort your database in a variety of ways, and perform quick and easy will searches and retrievals. All without the burden of maintaining the will database records.

## 7/ Offer your clients document security at the final stage of estate planning.

As more lawyers have stopped offering will storage, clients are left with options that compromise the security and accessibility of their original will.

Storing wills at home or in a safety deposit box, for instance, may introduce problems during the estate administration process.

Custodius allows lawyers to offer a highly secure and easily affordable storage solution, demonstrating a complete and differentiated level of client service.



# Storing New Wills: How Secure Storage and Registry Works

1

During your intake meeting with the client, you explain why the issue of will storage is important and why your firm uses Custodius for long-term will storage\*.

2

Your staff start the registration process for your client by completing a brief online form and paying the registration.

3

A confirmation email is sent to your client, with a link your client uses to confirm the registration information and accept the User Agreement.

4

Once the client completes the registration process we send you a shipping package to courier the original will directly to our secure facilities.

5

You and your client will each receive an email confirming the safe arrival and storage of the will in a Custodius vault.

With your client's will now safely in storage, their file is added to your private will bank database, searchable and accessible at any time from your dashboard.

Your firm will now enjoy all the benefits of partnering with Custodius. This includes regular business development in the form of notifications of relevant legislative changes, and annual outreach encouraging your clients to contact you if they've experienced any major life events that should trigger a reevaluation of their estate plan.

\* If the client chooses to take their will home instead, they sign a waiver that acknowledges they declined storage (don't worry, we provide you with a template you can customize.)





# Transferring Your Current Will Bank Storage to Custodius

## Lawyers can batch transfer any volume of wills to Custodius.

While Custodius lets you register newly written wills at any time, you can also batch transfer your current wills in storage to our secure storage facility. Whether you have 10 wills or 10,000, Custodius will work with you to make the will transfer process seamless and hassle free.

Working with you, or a staff member from your office, we offer guidance and assistance in transferring your will bank to Custodius. For more information on our will transfer service, contact us at [support@custodius.ca](mailto:support@custodius.ca). You can schedule a meeting with us so that we can understand your current storage situation and discuss your options.





# Frequently Asked Questions

## Is Custodius good for my clients?

Yes. As you know, the original signed paper will is critical to obtaining a Certificate of Appointment. Wills stored at home are at risk of damage by tampering, theft, fire, flood, humidity, and pests. With age, loss of capacity and downsizing can be the number reason that clients lose their wills. Clients may choose their safety deposit box (SDB) for will storage, but as we know they will be inaccessible by any non-SDB owner without a Certificate of Appointment. When given the choice between taking their will home or storing it with Custodius, 94% trusted in Custodius.

## Is Custodius good for me and my firm?

Yes. Increasing requests to search your will database, rising storage costs, and the liability of storing these documents have made storing wills more difficult. At no cost to the lawyer, Custodius offers safe, reliable storage, alleviating the administrative and financial burden and removing the liability of storing client property once the retainer is complete. Custodius also offers lawyers client business development. A will search on the Custodius website is simple with immediate results.

## Does Custodius store power of attorney (POA) documents?

Not yet...but soon! It's important that the POA documents not be included in the Will Storage Envelope, as they are needed at different times.

If this would be a useful service for you, please let us know at [support@custodius.ca](mailto:support@custodius.ca). We are always prioritizing upgrades to our service, and we want to be sure we are focused on what will serve you better.

## I've always stored wills. Will switching to Custodius risk us losing future estate business?

No. Your clients remain connected to you as their lawyer within Custodius, and Custodius clients are reminded periodically that you are their estate planning lawyer. Custodius works hard to nurture and facilitate a lifelong lawyer-client relationship.

## Can Custodius assume responsibility for current will bank?

Yes. Custodius offers a 'bulk transfer' program to transition currently stored wills to the Custodius vault. This process modernizes and systematizes your will database on a secure cloud-hosted platform and alleviates the burden and liability of storage. Please contact us for details.

## I want to increase the value of my practice. Will I lose the value of my stored wills?

When you transfer your stored wills to Custodius, your practice may become more valuable. At your request we can "transfer" your clients to a new lawyer, but the wills never move. Your stored wills are more marketable to the successor law firm or lawyer, who get "ownership" without the headache of handling the paper wills.

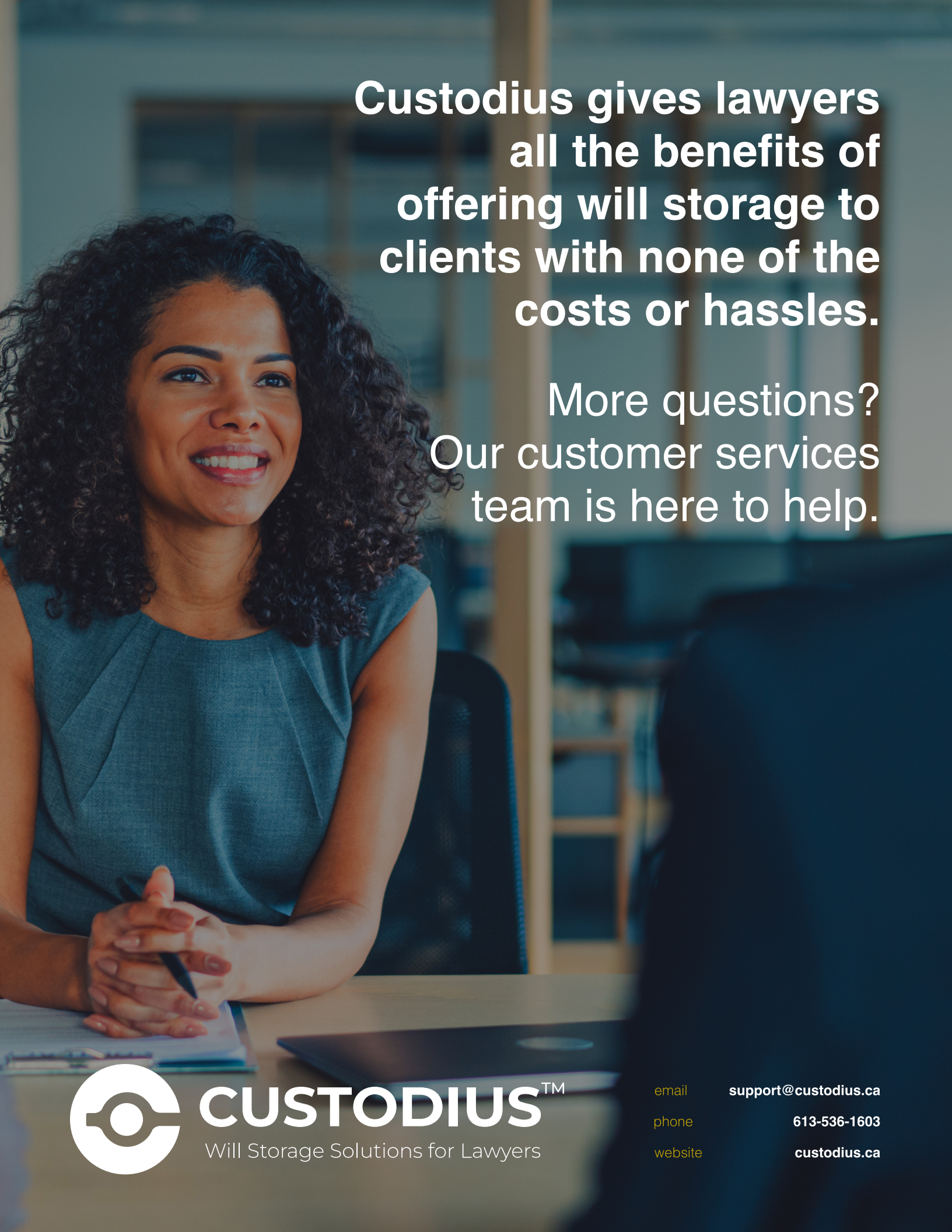
## As we switch to Custodius, do we still have an obligation to respond to will search requests?

No. When you transition away from offering will storage, you are relieved of your obligation to perform searches because you are no longer storing wills. The Custodius will database is fully searchable for anyone looking for a will. Just refer the requesting lawyer to the Custodius website and we'll help them with their search.

## How much does Custodius cost?

There is no cost to the lawyer. Clients pay lifetime membership fee of \$100 plus shipping and HST. There are no recurring fees. If a client wants to change their will, there is a \$45 charge. Retrieval of the will is \$200, generally paid by the client's estate after their death.





**Custodius gives lawyers  
all the benefits of  
offering will storage to  
clients with none of the  
costs or hassles.**

**More questions?  
Our customer services  
team is here to help.**



**CUSTODIUS**<sup>TM</sup>  
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