

Online will service comparison checklist

A printable worksheet to help you compare suitability, checking, support, total price and terms — before you follow any provider link.

Use this before you buy

Write down what each service actually includes. If an important answer is missing or unclear, ask the provider before paying. Keep a copy of its terms and your completed answers.

1. Start with suitability

- ☐ My wishes are straightforward and I understand who I want to benefit.
- ☐ I know which part of the UK's legal system applies to me and the service says it covers it.
- ☐ I can describe my assets, debts, dependants and important family circumstances accurately.
- ☐ I can arrange suitable witnesses and follow the signing instructions exactly.
- ☐ I have checked whether any overseas assets, business interests, trusts or tax issues make my situation more complex.
- ☐ I have checked whether anyone may be financially dependent on me or likely to challenge the will.
- ☐ I am acting freely, have mental capacity, and nobody is pressuring me about what the will should say.
- ☐ I know where the signed original will is going to be stored and who will be told where it is.

Pause and get legal advice if needed

Complexity does not mean something is wrong. It may mean tailored advice is safer than a standard online journey.

My situation: anything a provider or solicitor needs to know

2. Compare the service, not just the headline price

Enter the provider names across the top, then record the answer you find on the provider's own website or in its terms.

What to compare	Provider 1	Provider 2	Provider 3
Who provides it? Legal business name, contact details and applicable regulator, if any.			
Where is it suitable? England and Wales, Scotland, Northern Ireland, or more than one jurisdiction?			
How are answers checked? Automated checks, staff review, solicitor review, or no stated review?			
What is included? Single or mirror wills, guidance, revisions, printing and signing instructions.			
What is excluded? Complex families, trusts, tax planning, overseas assets, business assets or other limits.			
Help before payment Can you ask a question before committing? By what route and during what hours?			
Help after payment What happens if you spot an error or your circumstances change?			

3. Record the full price and the important terms

What to compare	Provider 1	Provider 2	Provider 3
Total price Include VAT and any compulsory extras. Note whether the displayed price can change.			
Optional extras Storage, updates, printing, telephone help, executor services or subscriptions.			
Refund or cancellation Time limits, conditions and what happens once document preparation begins.			
Revisions How many changes are included, for how long, and what happens after approval?			
Document delivery Download, post, or both? Is a printed copy included?			
Storage Who holds the signed original? Is storage optional, paid, insured and retrievable?			
Data handling What information is collected, where is it stored, and is it shared with others?			
Complaints Who handles complaints and is any independent complaints route stated?			

Check the terms yourself

Save or print the version you relied on. Affiliate websites can explain choices, but only the provider controls its current service and terms.

4. Final checks before paying

- ☐ The service clearly says it can help with my part of the UK and my circumstances.
- ☐ I know whether a person, automated system or solicitor will check my answers and draft.
- ☐ I understand what the review does — and does not — cover.
- ☐ I have checked the total cost, possible extras, cancellation terms and revision policy.
- ☐ I understand how to sign and witness the will, and that an unsigned online questionnaire is not a valid will.
- ☐ I know how to contact the provider if something goes wrong.
- ☐ I will review the will after major life changes and get advice if my circumstances become complex.

My preferred option and why

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Provider / route chosen	Date checked	Total expected price

Reliable starting points

- [GOV.UK: making a will](#)
- [Citizens Advice: wills](#)
- [The Law Society: find a solicitor](#)
- [Here4Wills: online wills comparison guide](#)

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