Osprey Approach: Change of Name Deed

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The latest version is always online at
https://support.ospreyapproach.com/?p=35639

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ALLOCATE A CUSTOM QUESTIONNAIRE

CHANGE OF NAME FILE OPENING FW_NOM

Client salutation

Clients Current Full Name

Client's Proposed New Full Name

Please enter client's previous names here. This does not include the client's current name. If there is more than one name, separate them with a comma but do not add any other punctuation.

Any Names Client Has Been Known By Previously

Submit Cancel

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CHANGE OF NAME FILE OPENING FW_NOM

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Any Names Client Has Been Known By Previously

Submit Cancel

CLIENT'S NEW NAME FW_NOM

Enter the client's new name here. This will change the name stored against their Osprey client record.

Title

Initials

Forename

Surname/Company Name

Submit Cancel

Blank client letter

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy"} }

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_FORENAME_1 }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { MERGEFIELD FW_NOM_FW_CLI_SALUT }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

Change of Name Deed

THIS change of name deed is made the day of
by me, **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}**, of **{** MERGEFIELD CLIENT_HOUSE \f", " **}{** MERGEFIELD CLIENT_AREA \f", " **}{** MERGEFIELD CLIENT_POSTAL_TOWN \f", " **}{** MERGEFIELD CLIENT_COUNTY \f" " **}{** MERGEFIELD CLIENT_POSTCODE **}**

THIS DEED WITNESSES AND DECLARES

1. Prior to changing my name to **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}**, my name was **{** MERGEFIELD FW_NOM_FW_NOM_CURNME **}**.
2. I renounce and abandon my previous name, **{** MERGEFIELD FW_NOM_FW_NOM_CURNME **}{** IF **{** MERGEFIELD FW_NOM_FW_NOM_PRVNAMES **}**<> "" " and the following previous names I have also been known as: **{** MERGEFIELD FW_NOM_FW_NOM_PRVNAMES **}**" "" **}**
3. I renounce and abandon the use of my previous names and shall, from now on, in all deeds and instruments use my new name, **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}**.
4. I authorise all persons to address me by my new name, **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}**.

IN WITNESS of which I have signed my new name **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}** and my previous name **{** MERGEFIELD FW_NOM_FW_NOM_CURNME **}** on the date stated above.

SIGNED AS A DEED

……
……

By the above named **{** MERGEFIELD FW_NOM_FW_NOM_NEWNAME **}**

……
……

Previously known as **{** MERGEFIELD FW_NOM_FW_NOM_CURNME **}**

In the presence of

……
……..

Witness name:

Witness address:

Client Care Letter

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Our Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy"} }

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 }
{ MERGEFIELD CALCULATION_ADDRESS }

Dear { MERGEFIELD FW_NOM_FW_CLI_SALUT }

RE: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

I am { MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }, a { MERGEFIELD CALCULATION_STATUS_DESCRIPTION }, in the Family Department. I will have conduct of your matter throughout. I am supervised by { MERGEFIELD CALCULATION_EXECUTIVE_NAME } who will also be aware of your matter.

Your Instructions

You wish to change your name. Your current name is { MERGEFIELD FW_NOM_FW_NOM_CURNME }{ IF { MERGEFIELD FW_NOM_FW_NOM_PRVNAMES }<> "" " and you have previously been known by { MERGEFIELD FW_NOM_FW_NOM_PRVNAMES }. " ". " }You wish to change your current name to { MERGEFIELD FW_NOM_FW_NOM_NEWNAME }.

Our Advice

You can change your name by Deed. You must use your new name for all deeds and documents, and will be known by that name solely.

Next Steps

I shall prepare a Change of Name Deed for your signature.

I will also require you to sign and return the enclosed client care documentation as soon as possible.

If you have any questions, please do not hesitate to contact me. I would encourage you to send any responses via our secure online portal where you will also be able to check the progress of your case. If you have any trouble accessing the internet would you please let me know. We send documents out to you via our secure portal to protect your personal data, however if you are unable to access the internet easily, I can arrange for correspondence to be sent to you via post or another means.

I look forward to hearing from you.

Yours sincerely,

{ MERGEFIELD "CALCULATION_FEE_EARNER_DESCRIPTION" **}**
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME }

Client enc. certified copies Deed

{INCLUDETEXT "C:\\Users\\neilb\\OneDrive - PRACCTICE LTD\\Documents\\OspreyOfficeGateway\\header.doc"**}**

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ QUOTE **{** DATE \@ "d MMMM yyyy"**} }**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD FW_NOM_FW_CLI_SALUT **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Please find enclosed X copies of your executed Change of Name Deed which I have certified to be true copies, which you may need to provide when you are updating your bank accounts, driving licence, passport etc. with your new name.

I also enclose the original Change of Name Deed, which you should keep in a safe place should you require further certified copies in the future. You may also be asked to provide the original in some circumstances.

This concludes work on this matter. May I take this opportunity to thank you for your kind instructions in this matter.

If I, or my Firm, may be of any further assistance please do not hesitate to contact me.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

Letter to Client confirming Deed

drafted

{INCLUDETEXT "C:\\Users\\neilb\\OneDrive - PRACCTICE LTD\\Documents\\OspreyOfficeGateway\\header.doc"**}**

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ QUOTE **{** DATE \@ "d MMMM yyyy"**} }**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_FORENAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD FW_NOM_FW_CLI_SALUT **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

I am pleased to confirm that I have now drafted your Change of Name Deed. I should be grateful if you would please make an appointment to see me at my office so you can sign the Deed, as it requires a witness.

Once you have signed the Deed, I will provide you with some certified copies as you may need these when changing your name with banks etc.

I look forward to meeting you soon.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }