MY CLINICAL WILL

Written while I am well, for the colleague who would step in for me

Jordan Example

EXAMPLE ONLY. Every name, number and detail in this document is fictional. It shows what Clinical Will produces for a BACP member.

If this has just arrived from me: nothing has happened. I am well, and I am sending it now so you have it ready, as we agreed. Please keep it somewhere you will find it again. You will only need it if my initiator, Sam Patel, contacts you to say I have died or can no longer work.

To my Clinical Executor

If my initiator has contacted you because something has happened to me, the arrangement you agreed to has begun. Thank you. Work through it in order: the first hours, the first days, the first weeks, the months after.

This document is one half of the arrangement: the contact details you will need stay in my records, and Part One says where they are and how the key reaches you, usually from my initiator: the person close to me who alerted you. Keep a dated note of each contact you make and each piece of advice you receive. Where a situation needs advice, ask my supervisor, my indemnity insurer, my professional body or a solicitor.

Who I am

Enough identity for my executor to speak for me to clients, my professional body and my insurer.

My name, and the name my practice trades under

Jordan Example

Professional body, membership number, and any register I appear on

BACP · 000000

Shaped to my professional body. I have worked to the wording of BACP (required from midday on 3 November 2026), last checked by Confident Therapist Hub on 12 October 2026. It asks: A clinical will in place, and an appointed executor who, bound by confidentiality, can communicate with clients if you cannot contact them or have died.

ICO registration and any other formal registrations

> ZA000000

Practice address, phone and email

> jordan@example-counselling.co.uk

Part One. The first hours: my records and the key

My client records, including names and contact details, are kept here (for an encrypted file, the link was sent to you separately, once, for you to keep)

> An encrypted Clinical Will file. The link was sent to you and to Robin Shaw in a separate message.

The key that opens them (password, passcode or physical key), and how it reaches you (usually: my Initiator, Sam Patel 07700 900456, hands it to you)

> Sam Patel holds the password and gives it to you if the day comes.

Opening an encrypted web file: use it straight from its link on a computer, or download it and open it in a web browser such as Chrome, Safari or Edge. A phone app's preview cannot usually unlock it: save the file to the phone first, then open it in the browser.

If the link or the location is lost: who holds a spare (someone who never holds the key, for example my backup executor or a supervisor)

> Robin Shaw 07700 900321 (my backup executor)

The key opens my practice records only. My personal email, banking and personal accounts are not part of this role, unless stated here:

Before you open anything, confirm that the arrangement has actually begun: speak to my initiator yourself and, where you can, to my family or my personal representative. A worried message on its own is not a reason to open clinical records. Holding the password lets you open the records; it does not by itself give you authority to use or share what is in them beyond the duties in this document.

Part Two. The first days: my clients and supervisees

- Work through the client list in my encrypted file, one person at a time. Where I have flagged concern, that person hears from you first, and my supervisor will gladly think it through with you.
- Use only the contact route recorded for each person. If someone else answers, say nothing about who you are, who I am, or why you rang until you are sure you are speaking to the right person: to anyone else, you are simply a wrong number.
- Keep the message small. What has happened, whether their sessions have ended or are paused for now, that their information remains confidential and will continue to be protected, and that help exists if they want it. Everything else can wait or need never be said.
- You should not need my clinical notes to make these first contacts. The client list and its contact details carry what the calls require; access the records only where necessary and authorised for the duties in this pack. If a safeguarding concern or another exceptional situation makes further information necessary, seek appropriate professional advice before accessing or sharing it.

Words, if words are hard to find

“My name is _____ and I am a [professional role]. Jordan Example arranged long ago that I would be the one to contact you if ever they could not. I am so sorry to say that day has come: [what has happened, in a sentence]. What you shared remains confidential: I have seen only the little needed to reach you, and information will only ever be used or shared where this role, the law or safeguarding genuinely requires it. If it would help to find someone new to talk to, I can suggest where to start.”

Where to point people who want to continue: services or colleagues I would trust with them

> BACP Find a Therapist directory
> Local NHS Talking Therapies
> Your GP

Anyone whose work with me has already ended who should still hear this from you, and why

If I supervise

My supervisees: where their details are, what to tell them, and anything their own clients' continuity depends on

Part Three. The first weeks: the circle, and the money

Beyond clients sits a circle of organisations and loose ends. A reference number in the right box below will save you a phone queue.

Who · How to reach them, plus any policy or reference number
Whoever handles my personal affairs
My supervisor or supervisors · Pat Lee · pat@example.org, 07700 900789
My own therapist, if I have one
My professional body · BACP, Membership 000000
My indemnity insurer · Example Indemnity Ltd, Policy EX-12345
Agencies and services that send me clients
My professional email account · jordan@example-counselling.co.uk
Anyone else who should hear it from you

Organisations and people to tell

You make these contacts. Everything linked to my practice is listed here, with the numbers you will need. My personal representative knows you are doing this.

Done · Organisation · Contact, and reference · What to tell them
[ ] · Professional body, BACP · Membership 000000 · Tell them what has happened. They can advise you and update their register.
[ ] · Indemnity insurer, Example Indemnity Ltd · Policy EX-12345 · Tell them promptly, and straight away if there is any complaint, claim or records request. Ask about run-off cover, how claims are handled and any record-keeping requirements. Do not assume cover continues after my death.
[ ] · Information Commissioner's Office (ICO) · ico.org.uk · 0303 123 1113, Registration ZA000000 · Tell them the practice has closed, and check whether my registration should end. If client records will still be held, establish who is responsible for them and whether that person needs to register or pay a data protection fee.

The money that belongs to the practice

Fees clients still owe me, and what I want done about them

> Write off any fees still owed.

Sessions already paid for that will not now happen: note them for whoever handles my personal affairs to settle

Your own time: most executors act unpaid, but if we agreed payment, the rate and who settles it, for you and for my initiator alike

My practice room, my social media accounts, my accounts and bookkeeping, and the rest of my affairs belong to whoever handles my personal affairs: the executor of my personal will if I have died, or my attorney under a power of attorney if I cannot act. They know that you and this document exist: flag to them anything you find. My website and directory listings are in the list of organisations above, for you to pause or close, so new enquiries stop.

Part Four. The months after: my records

Records outlive a practice.

Traces elsewhere: a diary, a phone, an email inbox. What exists, and what to do with each

Records, complaints and claims

My intention is that my executor deals with immediate client contact, and does not take on long-term responsibility for storing my records or managing complaints and legal claims, unless we have expressly agreed it. If I have died, the person legally responsible for managing my affairs will need to establish who is responsible for my client records and for answering any requests. My personal representative, my insurer or a solicitor may need to advise on who has authority to respond, to open the records, and to arrange their continued storage or their disposal.

Who I expect to arrange the ongoing storage and management of my records

If a complaint, a request for records or legal correspondence arrives, note when it was received and pass it promptly to the person responsible. Acknowledge it to the person who sent it. Do not disclose or destroy anything while the matter is being considered.

If someone asks for a client’s records

If a client, or someone acting for them, asks to see their records after I have died or stopped practising, do not release anything straight away and do not ignore the request. Note the date and exactly what was asked. A client’s right of access continues while they are alive. A request does not have to be in writing, and it normally needs a response within one calendar month of receipt, so record when it was first received and act early. The person responsible should check the deadline and whether any extension or exemption applies, for example to protect other people’s information. Ask my indemnity insurer, and if needed the ICO or a solicitor, how to answer. Release only what is lawful, and keep a note of what you decided and why.

This is guidance, not legal advice.

Before destroying anything: do not destroy records connected with an actual, threatened or reasonably anticipated complaint, claim, investigation, safeguarding matter or access request. Preserve them securely, and contact my indemnity insurer for advice before contacting the client concerned and before any disposal.

Before anything is destroyed, be clear who has authorised it, which records are being destroyed, that no retention period or legal hold still applies, and whether other copies exist. Keep a note of each of these.

When destruction is due for records held in this app: open the app on my device and use Closing down, then Erase everything, which clears this device and can delete the encrypted copy in my Dropbox too. Uninstalling alone does not reliably remove the data. Check for other devices, saved backup files and synced copies, and use confidential shredding for paper. Destroying every written copy of the password leaves any remaining encrypted copy unreadable for good. Keep a note of what was destroyed and when, and keep this document until every duty in it is complete.

Action log (for my executor)

A dated note of each contact you make and each piece of advice you receive. It protects you, and it shows anyone who asks later what was done and why.

Date	Who was contacted or consulted	How	Outcome or advice

Records requests

If anyone has asked to see their records and has not had an answer, note it here and pass it on straight away. A request does not have to be in writing, and it normally needs a response within one calendar month of receipt, not of the day you found it. Destroy and change nothing connected with it.

Date received	Client or reference	Passed to, and when	Insurer told?	Deadline

Keeping this pack true (for me, the practitioner)

Review these instructions regularly to make sure they remain accurate and workable: at least once a year, and after any change of executor, supervisor, insurer or premises. I read it as if I were the person who needs it, and note the review below. Last reviewed in the app: 20/10/2026.

Date · What I changed, or “read and still true”
20 October 2026 · Read and still true

Signatures

If you keep a printed copy, each of us signs and dates it here. Your agreement to act is also signed separately, in the app.

Me

This document says what I want done for my clients and my practice. I wrote it freely, while well.

Signed: _____ Date: _____

My executor: Alex Morgan

I have read this document with its author. I will act when the time comes, and I will access, use and share information only where necessary for the duties in this clinical will, or where the law, safeguarding or my professional obligations require it.

Signed: _____ Date: _____

My backup executor (steps in only if my executor cannot): Robin Shaw

I have read this document, and on the same terms I will act if called on.

Signed: _____ Date: _____

My initiator (optional, and welcome): Sam Patel

I know who to call, and I know where my card is.

Signed: _____ Date: _____

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