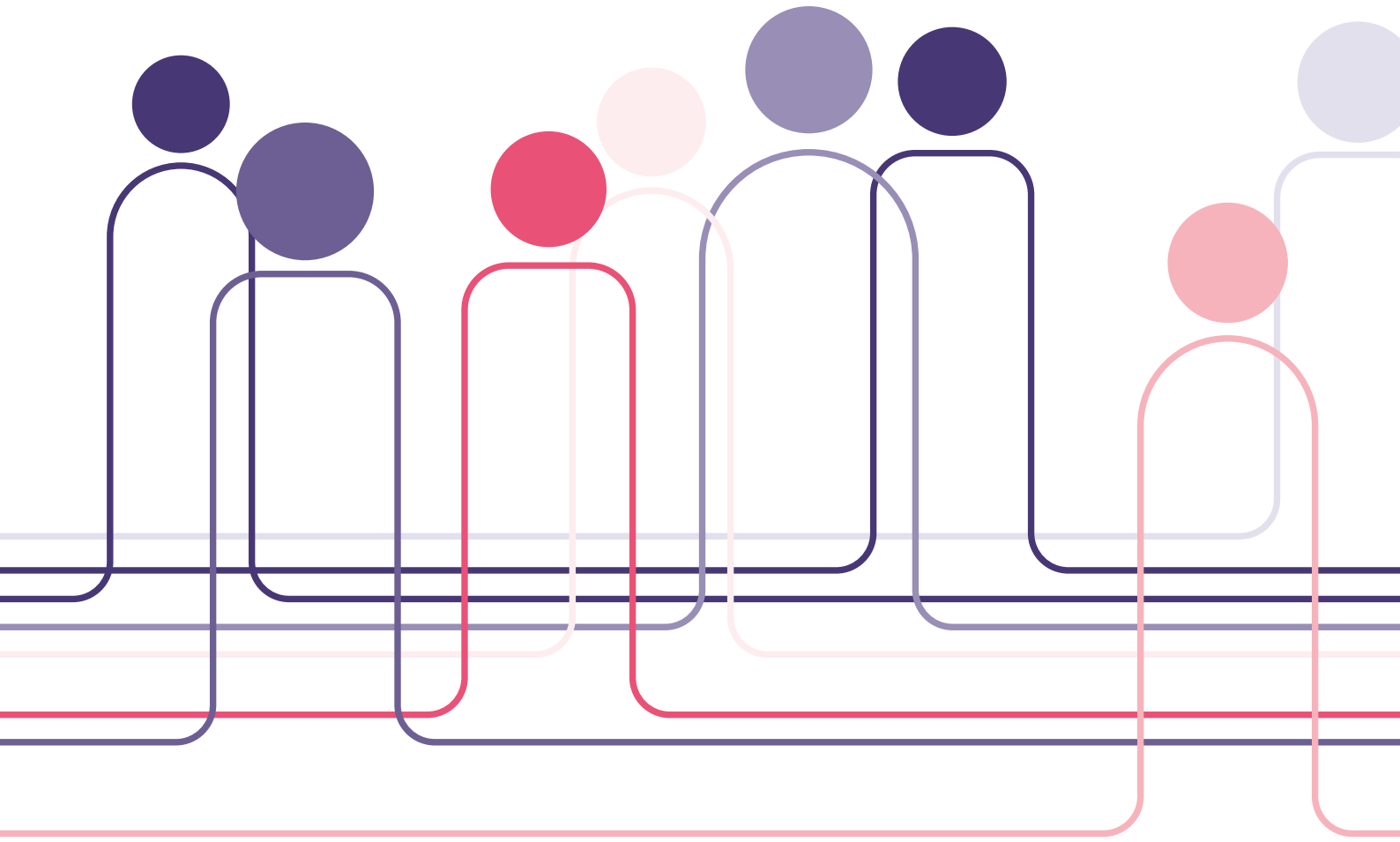
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Clinical Wills



Checklist

Ethics Essentials

What is a clinical will?

The E*thical Framework* requires members to consider breaks and endings, including those in respect of our death, an accident, or illness of sufficient severity to prevent us communicating directly with our clients. Core responsibility 4.5e requires us as practitioners to have a clinical will in place (BACP 2026).

A clinical will is the plan you agree with the person you have appointed – your clinical executor. It will detail how the appointed person will carry out your wishes in respect of your clients, supervisees and colleagues.

What should the will include?

- instructions about how to locate and access client records, who to contact eg partner and contact information (including the clients' preferred or previously agreed form of contact)
- contact details for any organisations and agencies you work for, clearly indicating which clients will be contacted directly by these agencies, and which clients will need the executor to contact them
- guidance regarding what to do with client records (who will keep – or securely delete – the client records). Usually this will be informed by what the practitioner has agreed with the client, any statutory duty, and organisational guidelines. Ensure you comply with GDPR requirements (GDPR 2018).
- which clients you work for that you want the executor to contact – and how this contact should be made
- which supervisees, colleagues, organisations you wish them to contact, and how this contact should be made
- how the person being contacted can access messages from your executor (for example, you need to consider whether their email or phone account are shared with someone else)

- which, if any, email accounts the clinical executor should access and how they can access them (for example, what information they may need to log in and where this information can be found); many email accounts require a username and password, and each email provider will have their own privacy agreements and policies should the owner of the account die, what policies and procedures for accessing your data there are in any organisations and agencies you work for, and how to contact them.

- how they are to follow up any unpaid bills owing by you.

Choose the executors

This should be a trusted competent and confidential person eg a colleague/peer or supervisor. They will contact your clients when you are unable to and need to be willing and able to undertake the role. They will be bound by confidentiality and follow the instructions you have given them. It is also important to clarify if the executor will require any payment for the service and if so how this will be made.

Telling your clients

Details about your clinical will should form part of your initial contracting with your client. Giving details of what circumstances they may be contacted in, who will contact them and what information you will share with this person, allows the client to make an informed decision about giving consent (GDPR 2018; Ethical principles BACP 2026).

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