



# Osprey Approach: Change of Name Deed

This help guide was last updated on  
Jul 25th, 2024

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



**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

 

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Any Names Client Has Been Known By Previously

**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

# **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 }

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# **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\_PRVNAME } <> "" " and the following previous names I have also been known as: { MERGEFIELD FW\_NOM\_FW\_NOM\_PRVNAME }" "" }
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\_PRVNAME }<> "" " and you have previously been known by { MERGEFIELD FW\_NOM\_FW\_NOM\_PRVNAME }. " ". " }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.

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Yours sincerely,

{ MERGEFIELD "CALCULATION\_FEE\_EARNER\_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME }

**Client enc. certified copies Deed**

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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 }**

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 }

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# **Letter to Client confirming Deed**

**drafted**

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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 }

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