

Clinical Will Template and Checklist for Therapists

Updated for the BACP Ethical Framework 2026. Plan for illness, incapacity and the unexpected, not just death.

The deadline

The British Association for Counselling and Psychotherapy (BACP) Ethical Framework 2026 becomes mandatory on **Tuesday 3 November 2026**. Core responsibility 4.5(e) requires every member to have a clinical will in place and an appointed executor.

Most clinical wills are written only for death. The more likely event is a hospital stay, an accident or a family emergency, when you're alive but can't reach your clients. This template covers both.

What's inside

- ☐ What each UK professional body expects (page 2)
- ☐ A fill-in clinical will template covering both a temporary pause and a permanent ending (pages 3 to 7)
- ☐ A step-by-step checklist for your executor on the day (page 8)
- ☐ Your checklist for 3 November 2026, plus privacy notice wording you can copy (page 9)

What your professional body expects

Every major UK body now expects you to plan for being suddenly unable to work. Check your own body's current wording, as guidance changes.

Body	What it expects
British Association for Counselling and Psychotherapy (BACP)	A clinical will and an appointed executor, bound by confidentiality, who can contact clients if you can't reach them yourself or if you die. Mandatory from 3 November 2026 (core responsibility 4.5e).
UK Council for Psychotherapy (UKCP)	Arrangements for informing clients, and supporting them where appropriate, if you become ill or die (Code of Ethics, point 28).
British Association for Behavioural and Cognitive Psychotherapies (BABCP)	Since 1 September 2023, a process for when you become unexpectedly unavailable, including serious illness, death, suspension or dismissal (standard 8.2).
British Psychoanalytic Council (BPC)	Two colleagues nominated to hold your patient and supervisee list in confidence if you die or can't work.
Counselling and Psychotherapy in Scotland (COSCA)	Members should consider arrangements for clients and supervisees in case of unexpected illness, death or other incapacity.
National Counselling and Psychotherapy Society (NCPS)	No clause naming a clinical will. The Code does ask you to tell clients about changes to your health or ability to practise, and to tell the Society in writing. A clinical will is how you meet that if you can't act.

How to use this template

- 1. Fill it in.** Work through each section. Leave out anything that doesn't apply to your practice.
- 2. Never write passwords here.** Note *where* access is held, or *who* can provide it. Anyone who finds a document with passwords in it can get into your client records.
- 3. Sign it with your executor.** You each keep a copy, or your executor knows exactly where to find it.
- 4. Review it every year,** and whenever your caseload, executor or systems change. Use the review log on page 7.

A clinical will is also called a professional will, therapeutic will or practice continuity plan. Your executor may be called a clinical executor, clinical trustee or professional executor. A clinical will is a professional arrangement, not a legal will.

My clinical will

This document sets out what should happen to my clients and my practice if I am suddenly unable to work, whether for a short time or permanently.

1. About me

Full name

Practice name

Practice address

Phone and email

Professional body and number

Second body and number

Clinical supervisor and contact

Insurer and policy number

Date of this will

2. My clinical executor(s)

Usually a qualified therapist you trust, such as a colleague, peer or your supervisor. Appointing two gives you resilience, and some bodies expect it.

Executor 1

Full name

Qualifications

Relationship to me

Phone

Email

Date they agreed

Executor 2 (back-up, or sharing the work)

Full name

Qualifications

Relationship to me

Phone

Email

Date they agreed

If there are two executors, how the work is shared

3. Who would tell my executor

The person most likely to hear first, such as a partner, relative or friend. They should know who your executor is, but they don't need access to anything.

Name

Relationship to me

Phone and email

Do they know my executor?

4. What my executor may do

Tick everything you authorise.

- ☐ Contact my clients to let them know what has happened
- ☐ Cancel or postpone my sessions
- ☐ Arrange onward referrals or interim support for clients who want it
- ☐ Stop new bookings and automatic reminders
- ☐ Deal with outstanding invoices, as set out in section 10
- ☐ Tell my supervisor, insurer, professional body and referrers (section 12)
- ☐ Deal with my records: keep, transfer or destroy them as set out in section 11
- ☐ Contact my supervisees and trainees (section 9)

Anything else, or anything my executor must not do

5. Where to find things

Write where access is held, or who can provide it. Never write passwords.

Client list and contact details

Diary and appointments

Clinical notes and records

Practice email

Practice phone and voicemail

Paper records and their key

Website and directory listings

Practice management software

Password manager emergency access

6. If I'm temporarily unable to work

For example a hospital stay, an accident or a family emergency, where I expect to return. What should happen to sessions, clients and money in the meantime? When should my executor check whether the pause should become an ending?

7. If I can't return, or if I die

What should happen to my clients, my practice and my records if I won't be coming back?

8. What I'd like my clients told

How and by whom clients should hear the news, and what support they should be offered. Consider clients who may find this especially hard.

Couples, family and joint work

Should both partners hear the same message, and together or separately? What if one partner has contacted me individually?

9. Supervisees and trainees

Who they are, how to reach them, and any training providers or placements to inform.

10. Money

Accountant and contact

Where invoices are kept

Outstanding fees: collect, or write off?

Prepaid sessions to refund

Subscriptions to cancel

Expenses for my executor paid from

11. Records

Where records are kept

Records held outside my main system

How long I keep records

How records should be destroyed

Who holds records until then

12. Who else to notify

Tick each one off once they've been told.

Who	Name and contact	Told
Clinical supervisor		☐
Professional body (or bodies)		☐
Insurer		☐
Referrers and employee assistance programmes (EAPs)		☐
Training providers and placements		☐
Directory listings		☐
Accountant		☐
Information Commissioner's Office (ICO) registration		☐
Executor of my legal will		☐

13. Signatures

By signing, each executor agrees to act on this will and to keep everything in it confidential.

My signature _____ Date _____

Executor 1 signature _____ Date _____

Executor 2 signature _____ Date _____

Review log

Review at least yearly. A dated log is useful evidence if your professional body asks.

Date reviewed	What changed (or “no changes”)	Initials

For my executor: on the day

A calm, step-by-step list. You don't have to do everything at once. Start with clients who are booked soonest.

- ☐ Find out what has happened and whether it's likely to be temporary or permanent. Use section 6 or 7 accordingly.
- ☐ Tell the therapist's clinical supervisor.
- ☐ Stop new bookings and automatic reminders, so no client receives a routine message.
- ☐ Check the diary for the next two weeks. Contact those clients first.
- ☐ Contact each client personally, following section 8. Keep a note of who you've reached and when.
- ☐ Offer interim support or referrals to clients who want it.
- ☐ Cancel or postpone sessions, and tell the clients affected.
- ☐ Work through the notification list in section 12.
- ☐ Deal with invoices and refunds as set out in section 10.
- ☐ Keep records secure. Don't take copies home, and follow section 11.
- ☐ Keep a short log of what you did and when.
- ☐ Look after yourself. This is hard work. Take it to your own supervision.

A note on confidentiality

You're bound by the same confidentiality as the therapist. Share only what each person needs to know. Family members can support you, but shouldn't see client information.

Your checklist for 3 November 2026

- ☐ Read your professional body's current requirement (page 2).
- ☐ Choose your executor, ideally two, and ask them properly.
- ☐ Complete this template, covering illness and incapacity as well as death.
- ☐ Sign it with your executor(s), and make sure they know where it is.
- ☐ Tell the person who'd hear first who your executor is (section 3).
- ☐ Tell the executor of your legal will that your clinical will exists.
- ☐ Add clinical will wording to your privacy notice and working agreement (below).
- ☐ Discuss it at your next supervision session.
- ☐ Put a yearly review in your diary.

Wording for your privacy notice and working agreement

The BACP Ethical Framework 2026 asks you to tell clients about foreseeable limits to confidentiality. You can adapt this:

"If I become seriously ill, am unable to work, or die, a named clinical executor, who is a qualified therapist bound by confidentiality, may contact you using the details I hold. They will let you know what has happened and help you arrange other support if you want it."

Or skip the paperwork

Therasee builds your clinical will into your practice, so it stays current on its own.

- Set up in about five minutes. Therasee writes the document for you, or attach the will you already have.
- Your executor reads and signs online, and doesn't need an account to accept.
- Nothing opens until it's needed: you hand over, or Therasee support releases it after checks.
- No passwords. Your executor gets their own sign-in and a code texted to their phone.
- You choose what they see. Notes and invoices are off unless you tick them.
- Automatic reminders and invoice chasers pause, and everything your executor does is logged.
- Always current, with a yearly check and a signed PDF you can download. Stored in the UK and encrypted.

[Set up your clinical will at therasee.com](https://therasee.com) | Free to start, no credit card required.