

LEGACY CARE PLAN UPDATES GUIDE

A flexible legacy

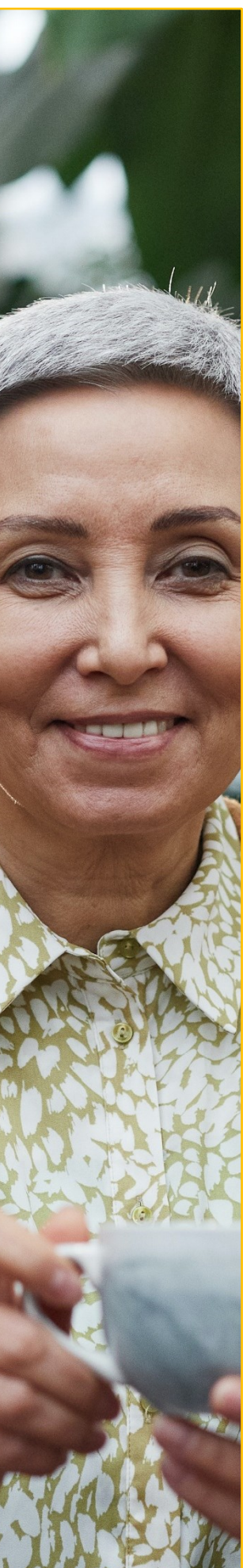


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What is this guide about?

Your Legacy Care Plan entitles you to an annual minor amendment to your Will. You are also entitled to an entirely new Will after a set period of time.

In a Standard Plan, this is every 3 years; in an Advanced Plan, it is every 2 years; and in a Premium Plan, it is every year.

This Legacy Care Plan Updates Guide outlines what constitutes a minor amendment and what changes require the creation of a new Will.

How to use this guide

Minor changes can be made annually whilst certain changes are considered “major changes” and require a new Will to be produced.

Read this guide to determine whether you need a minor change that can be made annually, or require a new Will to be made.

If you require further help and information, please do email info@adewills.co.uk and we will be more than happy to help you.

When do I need to update my Will?

It is recommended that you review your Will at least once every 5 years or on the occurrence of one of the following events:

- Getting separated or divorced
- Getting married (marriage but not divorce revokes a Will)
- Having a child
- Moving house
- If the executor dies or is unable to act
- If anyone else named in the Will dies



Affordable and accessible changes

Our Legacy Care Plans are designed to give you peace of mind and reassurance; as life events occur, you can update your Will accordingly, both effortlessly and cost-effectively.

Your Plan entitles you to make minor changes annually.

Should you need an entirely new Will, this is covered in your Plan every 1, 2 or 3 years, depending on whether you have a Premium, Advanced or Standard Plan, respectively.

Annual Minor Updates

Your Legacy Care Plan entitles you to one new Will containing only **minor updates** each year.

What constitutes a Minor Update?

A **minor update** consists of the following:

- Changing the name of a person mentioned in your Will (e.g. someone has since married and changed her surname)
- Changing the address of a person mentioned in your Will
- Swapping an appointed executor for another individual
- Swapping an appointed guardian for another individual
- Swapping a beneficiary of a specific gift or legacy for another individual



The events that cause these changes are often unpredictable and sometimes commonly occurring within a year.

Such changes may be required as a result of a marriage, divorce, death, house move, or other change in relationship with an individual.

We will contact you yearly to check if you need to make any minor updates. If so, we will make them and send you a new printed version to sign and return to us to store for you.

Major Updates and New Wills

Your Legacy Care Plan also entitles you to one new Will containing **major updates** in a given period depending on your Plan:

- Your Standard Plan entitles you to a new Will every 3 years
- Your Advanced Plan entitles you to a new Will every 2 years
- Your Premium Plan entitles you to a new Will every year

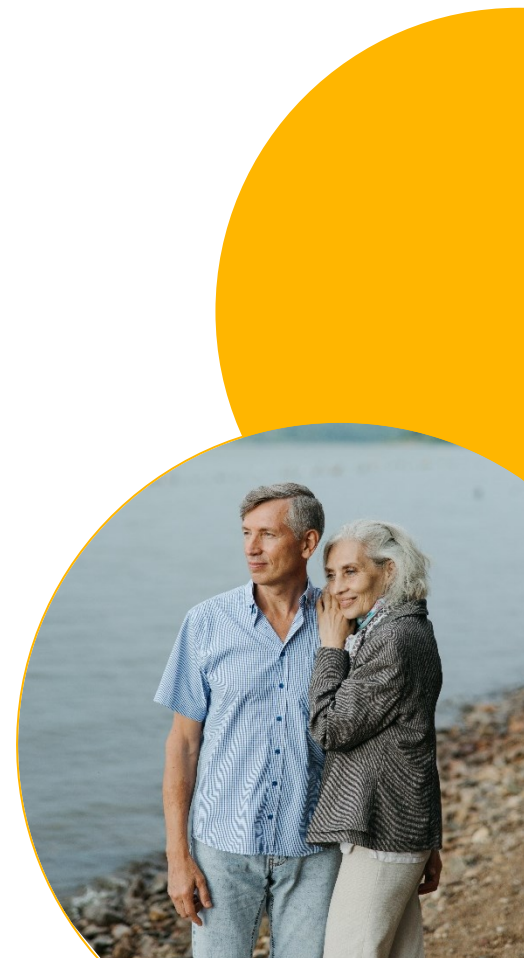
A new Will is required if you need to make at least one **major update** to your Will.

We will contact you to check if you need to make any major updates. If so, we will make them and send you a new printed version to sign and return to us to store for you.

What constitutes a Major Update?

A **major update** consists of the following:

- Any changes to the way in which your executors are appointed or act together
- Inserting or removing a new gift or legacy
- Inserting or removing an appointment (e.g. guardians or trustees)
- Inserting a new wish or instruction (e.g. a business succession clause, appointing trustees separately to your executors, adding funeral wishes)
- Any changes involving your residuary estate
- Inserting a trust (e.g. a life interest trust or discretionary trust)



What if I need to make more changes?

Life is unpredictable and ever-changing. There might be times where you have to make more changes to your Will than anticipated in a given year.

We believe that a Will is a “living” document. As such, amending it in accordance with life events must be affordable and effortless.



If you have already made a new Will and need to make more minor updates in the same year, then we will make them at a **10% discount** of the usual Will update service price.

If you have already made a new Will containing major updates in your Plan period and need to make more, then we will make them at a **10% discount** of the usual Will writing service price.

This way, updating your Will in response to unforeseeable changes is still cost-effective.



Ready to Get Started?

Simply select your chosen plan below to begin your Legacy Care Plan, and receive ongoing professional guidance to keep your legacy protected, accessible and up-to-date:

SINGLE PLAN
Starts at £10 p/m

COUPLE PLAN
Starts at £18 p/m

Want to know more?

If you have any further questions on your mind before starting, please, do feel free to contact our friendly team of professionals, and we will be more than happy to help you.

Call us today on
01865 507174

or email
info@adewills.co.uk

