

LEGACY CARE PLAN

Adapt with life

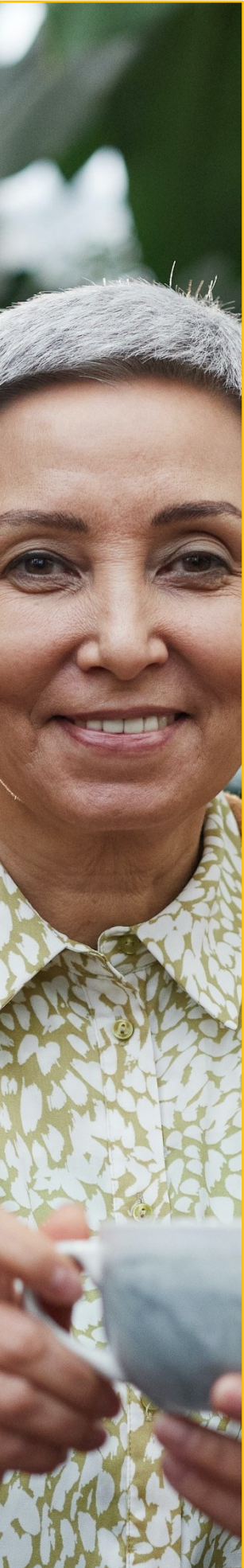


Safe to do
business with
Code Compliant

Contents

Contents	1
What is this guide about?	2
How to use this guide	2
Why do I need a Legacy Care Plan?.....	3
How to start my Legacy Care Plan	5
What's Included?	6
Pricing Table.....	13
Ready to Get Started?	14





What is this guide about?

You have taken the first important step in creating your legacy by writing your Will.

You are now looking for a cost-effective and flexible way to respond to life's changing circumstances and keep your legacy up-to-date.

This Legacy Care Plan Overview outlines how you can keep your Will safe, accessible and up-to date, to ensure your loved ones are looked after at all times.

How to use this guide

Read this guide to learn more about the help and support you will receive from our professional team of estate planners as part of your Legacy Care Plan.

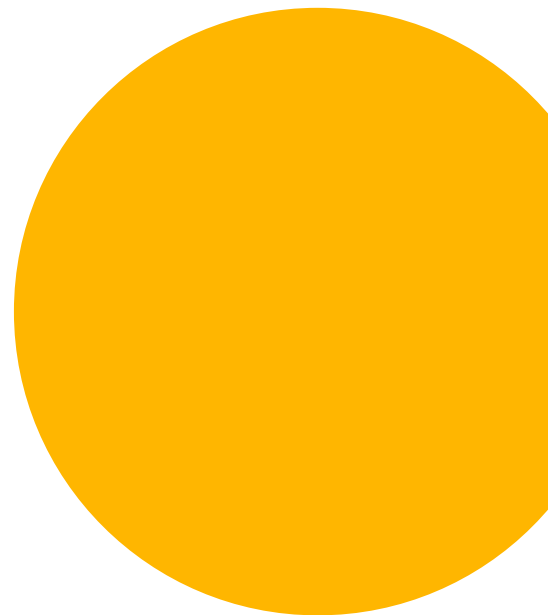
There is more information in this guide about what services are included, the discounts available to you and your secure storage solutions.

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

Why do I need a Legacy Care Plan?

Ensuring the safety, accessibility, and accuracy of your Will is paramount for the peace of mind and security of your loved ones. The Legacy Care Plan is crucial in safeguarding your legacy and preparing for the future.

In your plan, you benefit from a range of comprehensive and hassle-free solutions that allow for seamless updates and secure storage of your Will.



Updating your wishes with ease

Life is dynamic, and circumstances change over time. Your Will should reflect these changes accurately.

Our Legacy Care Plan offers a convenient way to keep your Will up-to-date, ensuring that it aligns with your current wishes and circumstances.

Through a manageable monthly subscription, you not only gain access to ongoing support but also the assurance that your Will is always current and reflective of your intentions.



Protecting your Will

The original copy of your Will is the most important version to keep safe. We store your Will in our fireproof cabinet.

We also provide you with a password-protected version of your Will.

This ensures that your Will is not only preserved but easily accessible so you can review whenever you wish.



Effortless peace of mind

When life events occur and circumstances change, remembering to update your Will, no matter how important it is to do so, is usually forgotten.

Your Plan gives you annual reminders to review your Will and keep it up-to-date, should anything change.

Simplifying probate

Informing your executors that we hold your Will is essential in helping them to carry out the administration of your estate.

On death, your Will is securely released to your executors on them providing us with a copy of your death certificate and the appropriate ID.

How to start my Legacy Care Plan

If you write your Will with us, whether it is via an online, telephone or home visit Will service, you have access to our Legacy Care Plans.

We have Single and Couple plans available.

Simply let your Will writer and estate planner know you wish to have a Legacy Care Plan by email or telephone, or you can get started by clicking your chosen plan in the Pricing Table below.



What's Included?

In your Legacy Care Plan, you will receive a range of useful features to help you effortlessly update your Will and securely protect your wishes from loss and damage at all times:

Secure Original Will Storage

If your Will cannot be located on death, then the law presumes it has been destroyed with the intention of revoking it. So, secure storage and ease of access are crucial in safeguarding your wishes.

For this reason, we place your Will in our fireproof cabinet for you.

Password-Protected Copy

Once your Will is placed in the fireproof cabinet, we provide you with a password-protected version of your Will. This copy cannot be printed for added protection.

Your password is secure and randomly generated. It is known only by you and our team.

This provides a secure way to allow you to access and review your Will with ease. You can even share a copy with your executors, should you wish.



Review Reminders

Whilst updating your Will is crucially essential as life events occur and your circumstances change, it is usually easily forgotten.

We will get in touch regularly to ask whether your circumstances have changed and to consider whether you need to update your Will, so you do not need to worry about remembering to do so anymore.



Free Will Reviews

If you tell us that your circumstances have changed, we will review your Will and advise you on how your Will needs to be updated accordingly.

We will arrange a call with you to discuss these in more detail, and to obtain your new wishes.

Will Update Services

Once we have your updated wishes, we will begin producing the initial version of your new draft Will, ready for you to review.

We will send this to you with a Clause Clarification Guide, which summarises the purpose and effect of each clause of your Will.

It is recommended that a Will should be reviewed every 3-5 years and updated after the occurrence of a marriage, divorce or separation, house move, having a child, or death of an executor.

Minor Changes

Your Legacy Care Plan entitles you to **one minor change** to your Will each year. A minor change includes one of the following:

- Change of person's name and/or address
- Change of executor
- Change of specific beneficiary
- Change of guardian



Major Changes

A **major change** includes one of the following:

- Inserting/removing a gift/legacy
- Inserting/removing an appointment
- Inserting a new wish (such as, informing us that you want to include a business succession plan)
- Changes to your residuary estate wishes
- Inserting a trust

A major change requires a new Will being drafted. A Standard Plan entitles you to one new Will every 3 years; an Advanced Plan allows for a new Will every 2 years; and your Premium Plan provides a new Will every year.

Printed Wills Services

Once you confirm you are happy with your updated draft Will, we will post your new printed Will to your home, with a downloadable Signing Guide, ready for signing.

Once you have signed it, you simply have to post it back to us, and we will provide you with a password-protected version and store the original in the fireproof cabinet for you.



Executor Will Release

A lot of probate delays can be caused when the Will cannot be easily located by the executors.

It is crucial to notify your executors that we hold your Will, aiding them in efficiently managing the estate's administration.

Upon your passing, your Will is securely handed over to your executors upon submission of a copy of your death certificate and the required identification.

10% Discount Across All Additional Services

Your Legacy Care Plan offers a cost-effective way to ensure you receive professional Will writing services each time you need to update your Will, rather than paying new Will writing fees each time.

When you update your Will, you may require additional support at some times.

If you did require or wish to obtain additional services, you will receive an additional 10% discount off the standard price.



Service	Standard Price	Your Price
Home Visit	£100	£90
Life Interest Trust	£100	£90
Discretionary Trust	£150	£135
Letter of Wishes	£75	£67.50
Joint Tenancy Severance	£150	£135
Discounts apply to services and do not include postage fees.		

Ongoing Expert Support

Within your Legacy Care Plan, we will be on-hand to provide you with ongoing advice, guidance and support for your estate planning queries.

For example, if you receive a large inheritance, move house, get married or divorced, you may be uncertain on whether you need to update your Will or how this could impact your inheritance tax liability.

In between your yearly reviews, our team will be on hand to answer your questions and give you reassurance and certainty. We shall also connect you with any financial advisors or mortgage brokers who can give you more relevant expertise in that area.



Free Will Registration

It is currently not a legal requirement to register your Will.

However, it is a good idea to do so as it allows your family and executors to locate the original version of your Will more easily and readily on your passing.

This is essential to ensure your wishes are upheld as the law presumes that the Will was destroyed with the intention of revocation, if it cannot be found on death.

To further protect your wishes, as part of your Legacy Care Plan, we will register your Will on The National Will Register.

The National Will Register ensures that a Will can be located and used to correctly distribute an estate, removing the risks associated with a Will being lost, misplaced or forgotten about over the passage of time.

It is £30 to register your Will yourself; however, we will do this **for free** as part of your Legacy Care Plan.



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

