



CLIENT GUIDE

Legacy Care Plan

Adapt with life

Keeping your Will safe, accessible and up to date — handled for you, so it never falls out of date.



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The Legacy Care Plan at a glance

- ✓ Stored safely in our fireproof cabinet, with a password-protected copy
- ✓ Reviewed every year — group up to 10 minor changes into a single update
- ✓ A brand-new full Will every 3 years, all handled for you

SINGLE PLAN

£10 p/m

COUPLE PLAN

£18 p/m

What this guide is about

You have already taken the most important step in protecting the people you love — you have written your Will. This guide explains how the **Legacy Care Plan** keeps that Will safe, accessible and up to date for years to come, without you having to remember to do a thing.

Life rarely stands still. A house move, a new grandchild, a change of heart about who should look after things — any of these can mean your Will no longer says quite what you'd want. The Legacy Care Plan is our simple, affordable way of making sure your wishes always keep pace with your life.

How to use this guide

Read on to see exactly what's included, how the plan works year to year, and what it costs. If anything isn't clear, we're always happy to talk it through — just call **01865 507174** or email **info@adewills.co.uk**.

Who it's for

Anyone who has made a Will with A.D.E Wills and wants it stored securely and kept current — whether you wrote it with us in person, at home or online.

In a sentence

A single, low monthly subscription that stores your Will, reviews it every year, and updates it as your life changes.

Why you need a Legacy Care Plan

Making sure your Will stays **safe, accessible and accurate** is one of the kindest things you can do for your loved ones. It spares them worry and delay at an already difficult time, and it makes certain your wishes are the ones that are followed.

The Legacy Care Plan brings all of that together in one place — secure storage, an annual review, and the updates your Will needs as the years go by.

A Will is not a "once and done" job

It's a living document. The best protection is a Will that's looked after — reviewed regularly and revised whenever your circumstances change.

Updating your wishes with ease

Life is dynamic, and your Will should reflect that. Our plan gives you a convenient, managed way to keep it in step with your current wishes — through a single manageable monthly subscription, with our team on hand whenever you need us.

You gain ongoing support and the reassurance that your Will always says what you mean it to say.

Protecting your Will

The original, signed copy of your Will is the version that matters most. We keep it safe for you in our **fireproof cabinet**, and provide you with a secure, password-protected digital copy so you can review it whenever you wish.

Your Will is both preserved and easy to reach — the best of both.

- ✓ Fireproof, secure storage of the original
- ✓ Password-protected digital copy
- ✓ Easy to review whenever you like

Effortless peace of mind

When life events happen, remembering to update your Will is one of the easiest things to let slip — however important it is. Your plan gives you **annual reminders** to review your Will, so nothing gets forgotten.

Simplifying probate

Telling your executors that we hold your Will helps them carry out your wishes smoothly. On death, your Will is **securely released to your executors** once they provide us with a copy of your death certificate and suitable identification.

The result: a Will that's always ready

Safely stored, kept current, and easy for your executors to find when it matters — that's the whole idea behind the Legacy Care Plan. The next few pages show exactly how it fits alongside our storage-only plan, and everything it includes.

Where it fits

A.D.E Wills offers two ways to look after your Will once it's written. The **Safe Will Plan** keeps it safe. The **Legacy Care Plan** keeps it safe *and* keeps it up to date.

Safe Will Plan

£3/mo single · £5/mo couple

Storage & safekeeping

- ✓ Fireproof storage of your original Will
- ✓ Password-protected copy
- ✓ Annual review reminder
- ✓ Executor release & free registration
- ✓ 10% off Wills services

HANDLED FOR YOU

Legacy Care Plan

£10/mo single · £18/mo couple

Everything in Safe Will Plan, plus updates

- ✓ **Everything in the Safe Will Plan**
- ✓ One yearly update — up to 10 minor changes at once
- ✓ A brand-new full Will every 3 years
- ✓ Free Will reviews when life changes
- ✓ Ongoing expert support all year round

The simplest way to think about it

The Safe Will Plan is **storage only** — it keeps your Will somewhere safe. The Legacy Care Plan is the step up: it's the **"handled for you, never falls out of date"** option, where we actively keep your Will current on your behalf.

How the plan works

One simple, repeating cycle keeps your Will protected and current — year after year.

1 We store your Will safely

Your original goes into our fireproof cabinet, and you receive a secure, password-protected copy.

2 We review it with you every year

An annual reminder prompts a quick check-in: has anything changed that your Will should reflect?

3 One update a year — up to 10 changes at once

Each year you can group up to 10 minor changes — a name, an executor, a specific gift — into a single update, made for you at no extra cost.

4 A brand-new full Will every 3 years

For bigger changes, you're entitled to a completely new, professionally drafted Will every three years.

5 Released to your executors when the time comes

On death, we release your Will securely to your executors, helping probate run smoothly.

One tier, everything included

The Legacy Care Plan is a **single plan** — there are no confusing levels to choose between. Everything above is included for one monthly price, whether you take a single or a couple's plan.

What's included

Your Legacy Care Plan brings together everything needed to keep your Will protected from loss and damage, and always reflecting your wishes:

Secure original Will storage

If a Will can't be found on death, the law presumes it was deliberately destroyed — so secure storage and easy access really matter. We keep your original safe in our fireproof cabinet.

Password-protected copy

Once your original is stored, we give you a password-protected digital version. Your password is randomly generated and known only to you and our team. You can review it any time, and share it with your executors if you wish.

Review reminders

Updating a Will is easily forgotten in the busyness of life. We get in touch regularly to ask whether anything has changed — so you never have to keep it in mind.

Free Will reviews

If you tell us your circumstances have changed, we'll review your Will and advise how it should be updated — arranging a call to talk it through and capture your new wishes.

Will update service

Once we have your updated wishes, we prepare your revised draft Will for review, along with a **Clause Clarification Guide** explaining the purpose and effect of each clause in plain English.

When should a Will be reviewed?

As a rule of thumb, review a Will every 3–5 years, and after any major life event — marriage, divorce or separation, a house move, a new child, or the death of an executor.

Minor changes

Each year your plan includes **one minor update**, in which you can group up to **10 minor changes** together. A minor change is any of:

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

That's up to 10 changes in one go each year — grouped into a single update, not 10 separate ones.

Major changes

A **major change** is one of:

- Inserting or removing a gift or legacy
- Inserting or removing an appointment
- Adding a new wish (e.g. a business succession plan)
- Changes to your residuary estate wishes
- Inserting a trust

A major change means a new Will is drafted. Your Legacy Care Plan entitles you to **a brand-new full Will every 3 years**.

Printed Will service

Once you're happy with your updated draft, we post your new printed Will to your home with a downloadable **Signing Guide**, ready to sign.

After signing, simply post it back. We give you a fresh password-protected copy and store the new original in the fireproof cabinet for you.

- ✓ New printed Will posted to you
- ✓ Clear step-by-step Signing Guide
- ✓ We store the signed original safely
- ✓ Updated digital copy provided

Executor Will release

Probate is often delayed when a Will can't be found. Letting your executors know we hold it helps them manage your estate efficiently.

On your passing, your Will is securely handed to your executors once they provide a copy of your death certificate and suitable identification.

10% off other services

Your Legacy Care Plan is a cost-effective way to keep receiving professional Will writing whenever you need it — rather than paying full fees each time. And whenever you need extra help beyond your included updates, you get **10% off** our standard prices.

Service	Standard price	Your price
Home Visit (Wills or LPAs)	£135.00	£121.50
Letter of Wishes	£95.00	£85.50
Sever a Joint Tenancy	£195.00	£175.50
Life Interest Trust	£175.00	£157.50
Discretionary Trust	£225.00	£202.50
Discounts apply to service fees and don't include postage or any third-party fees. A selection of popular services is shown — the same 10% applies across our wider service menu.		

Members save on more than the plan itself

Because updates are built into your plan, most changes cost you nothing extra. The 10% discount is there for the occasional larger piece of work — a trust, a joint-tenancy severance, an extra home visit — so the savings keep adding up.

Ongoing support & free registration

Ongoing expert support

Within your plan, our team is on hand all year round for your estate planning questions. If you receive a large inheritance, move house, marry or divorce, you may be unsure whether to update your Will — or how it affects any inheritance tax.

Between your yearly reviews, we're here to give you reassurance and clear answers, and we can connect you with trusted financial advisers or mortgage brokers where that would help.

Free Will registration

Registering your Will isn't a legal requirement, but it's a very good idea — it helps your family and executors locate the original quickly, which matters because the law presumes a Will that can't be found was deliberately destroyed.

As part of your Legacy Care Plan, we register your Will on **The National Will Register** for you, at no charge.

Registration — included free

Registering a Will on The National Will Register currently costs **£30 plus VAT (£36)** to do yourself (as at August 2026). With the Legacy Care Plan, we do it for you as a **free** part of your plan.

Your plan & price

One plan, everything included. Choose a single plan for yourself, or a couple's plan to cover both of your Wills.

Single Plan

£10

per month

Covers your Will

Couple Plan

£18

per month

Covers both of your Wills

What's included	Single	Couple
Fireproof cabinet storage	✓	✓
Password-protected copy	✓	✓
Annual Will review & reminders	✓	✓
Yearly update — up to 10 minor changes	✓	✓
A brand-new full Will every 3 years	✓	✓
Printed Will service & Signing Guide	✓	✓
Executor Will release	✓	✓
10% off other A.D.E Wills services	✓	✓
Ongoing expert support	✓	✓
Free Will registration	✓	✓

Billed at the monthly rate shown. Prices correct as at August 2026.

Ready to get started?

Begin your Legacy Care Plan

Choose your plan below and we'll take care of the rest — keeping your legacy protected, accessible and up to date.

SINGLE PLAN

£10 p/m

COUPLE PLAN

£18 p/m

Want to know more?

If you have any questions before starting, our friendly team is always happy to help. Just get in touch — there's no obligation.

Call us today on

01865 507174

Or email

info@adewills.co.uk

A.D.E Wills is a trading name of A.D.E Estate Planning Limited · 46 Woodstock Road, Oxford, OX2 6HT · adewills.co.uk
A.D.E Wills is a member of the Society of Will Writers and works to its Code of Practice. This guide is for general information about the Legacy Care Plan and is not legal advice. Prices are correct as at August 2026 and may change; full terms are provided before you sign up. The National Will Register self-registration fee quoted (£30 plus VAT) is set by that third party and may change.