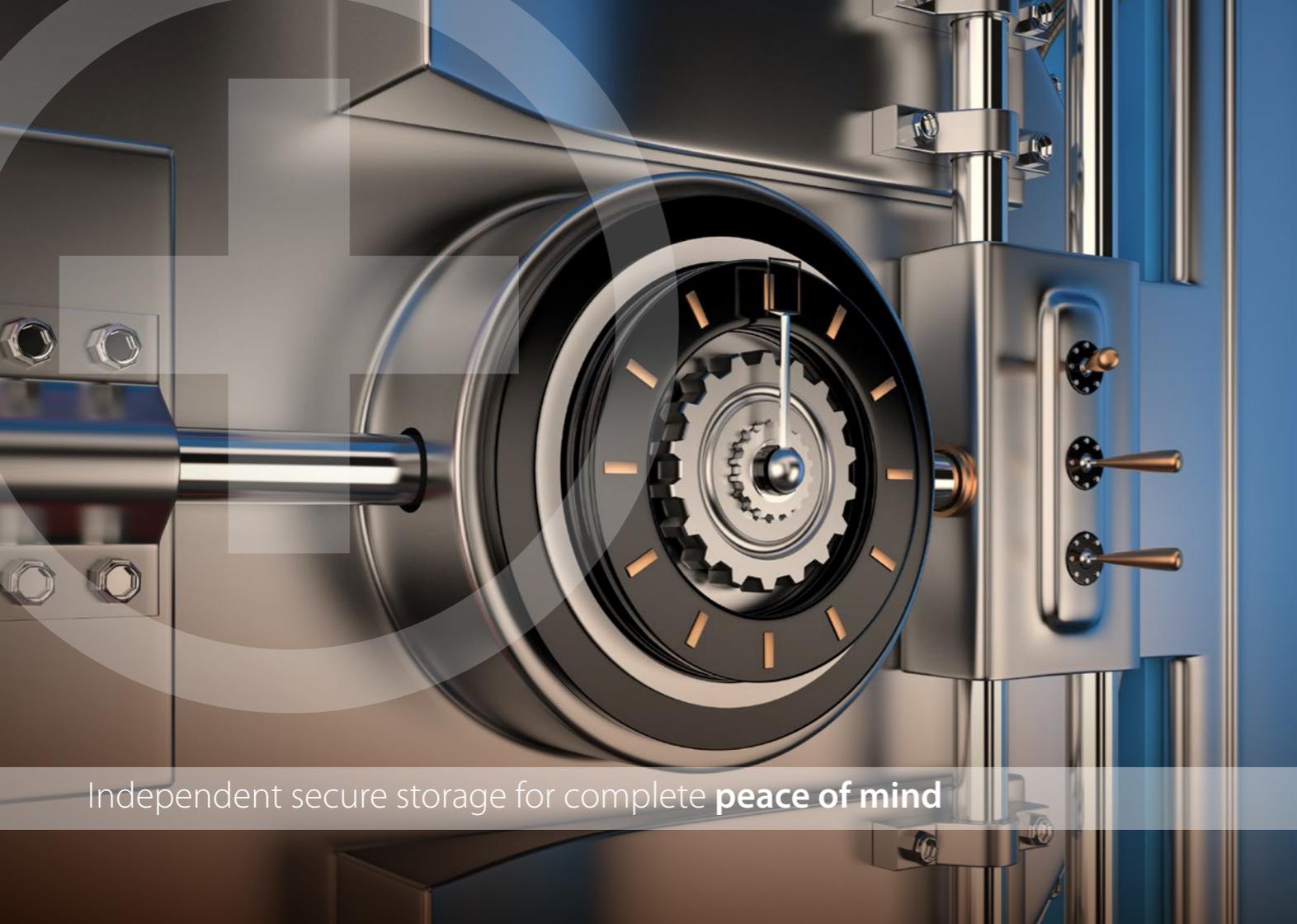


Storage PLUS

Safe document storage, *plus* many other benefits,
all designed to make life easier for you and your family.





Independent secure storage for complete **peace of mind**

Storage PLUS

estplan.co.uk

Making life easier for you and your family

Our Storage PLUS service is designed to provide long-term benefits for you and your family with the principal aims of ensuring that:

1. Your important legal documents are insured and stored safely and securely
2. Your Estate Planning documents are always up to date and fit for purpose
3. You reduce costs and stress for your family in the future

Secure legal document storage for your important documents

You have invested a lot of time, effort and money making your Will, Lasting Powers of Attorney and Trusts. It is extremely important that they are stored somewhere safe and secure. Keeping your original Will, Lasting Powers of Attorney or Title Deeds at home is not recommended. They could easily be lost, stolen, destroyed, or even tampered with. When a Will cannot be found it can lead to:

1. Lengthy, unnecessary delays and substantial legal fees
2. The application of the intestacy laws
3. Your wishes not being known or followed

We use a professional storage facility, which is fireproof and waterproof, protecting your important documents. Your documents are placed in a sealed envelope, are couriered to the storage facility and can be quickly and easily retrieved.



Documents in your home are at risk **Don't take any chances**

Storage PLUS

Safe storage of your **important documents**

1. Safe, secure legal document storage

We use an independent legal services document storage facility. Your documents are insured and are kept in a highly secure, fireproof, bombproof and waterproof environment.

2. Registration on the National Will Database

Your Will is registered on the only national database for Wills in England and Wales. It would normally cost you £30 to do this but is included within your annual fee. If a Will cannot be found this is the first place your Legal Adviser would look. This means your Will can always be found.

3. Registered Lasting Powers of Attorney

Once registered, your LPA's are powerful documents giving your Attorneys the ability to make decisions for you. It is vital that they are stored somewhere safe and secure, so they cannot be misused and will only be used if they are needed.

4. Unlimited Document Storage

As well as your Will, Trust Deeds and Lasting Powers of Attorney you can store house title deeds, insurance policies and any other important legal documents. There is no limit on how many documents you can store.

5. A copy of your Will

You receive a copy of your signed and witnessed valid Will but only after it has been validity checked by our specialist legal team. We check all our clients' attested documents before they go into storage.

6. Certificate of Storage

You also receive an individual Certificate of Storage, confirming your documents are in storage, where they are held and how to retrieve them.



Future-proof your planning with **Storage PLUS**

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Providing long-term planning, care and support

- + Information & Guidance Booklet for you, your Executors, Trustees and Beneficiaries.** You will receive an EPS document folder to keep all your paperwork in, together with a comprehensive booklet with useful information about updates, Executor duties, Trustees duties and the STEP provisions in full, explaining the standard powers built into your Will.
- + Free Basic Will Updates.** You can update your Will as often as you like. The need to update your Will can be the result of a change in family dynamics, or of your financial circumstances. It could also be the result of your wishes changing or the law changing. Any of these may affect your Will and Estate Planning.
- + Regular Reviews.** We will contact you every 2-3 years to review your current arrangements. Your review meeting is free and allows you to make sure your planning still meets your current wishes and is still fit for purpose. It also allows you to add anything you haven't already done.
- + Upgrade Price Promise.** Where you undertake basic planning through a Will Trust but decide to upgrade your planning at a later date to a Lifetime Trust, we apply a 10% discount.
- + Newsletters and Email Updates.** We started sending out regular newsletters in 2018. These are issued twice a year and cover important matters that may affect your planning. The rules around care fees and Inheritance Tax are constantly changing and it is very important that you are kept up to date.
- + 10% Discount on Probate.** Where your executors want professional assistance with probate, EPS have negotiated a 10% discount from our preferred partner law firm, Acer Prime Law, for full estate administration services. We have also negotiated a 2% cap. Some banks charge as much as 4-5% of the estate value for probate. The average probate fee is £9,000, so the saving can be substantial.
- + 10% Discount on Probate Assist.** Probate Assist is a reduced probate service, offering help and support to your named Executors. This service helps you deal with all initial matters and complete complex Inheritance Tax returns needed to obtain a Grant of Probate.
- + Helpline.** 0800 number for you and any family member or friend to get advice and help at any time. **0800 781 6658**

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of legal professionals **FREE on: 0800 781 6658.**



**Estate
Planning
Solutions**

PLANNING PROTECTION CERTAINTY