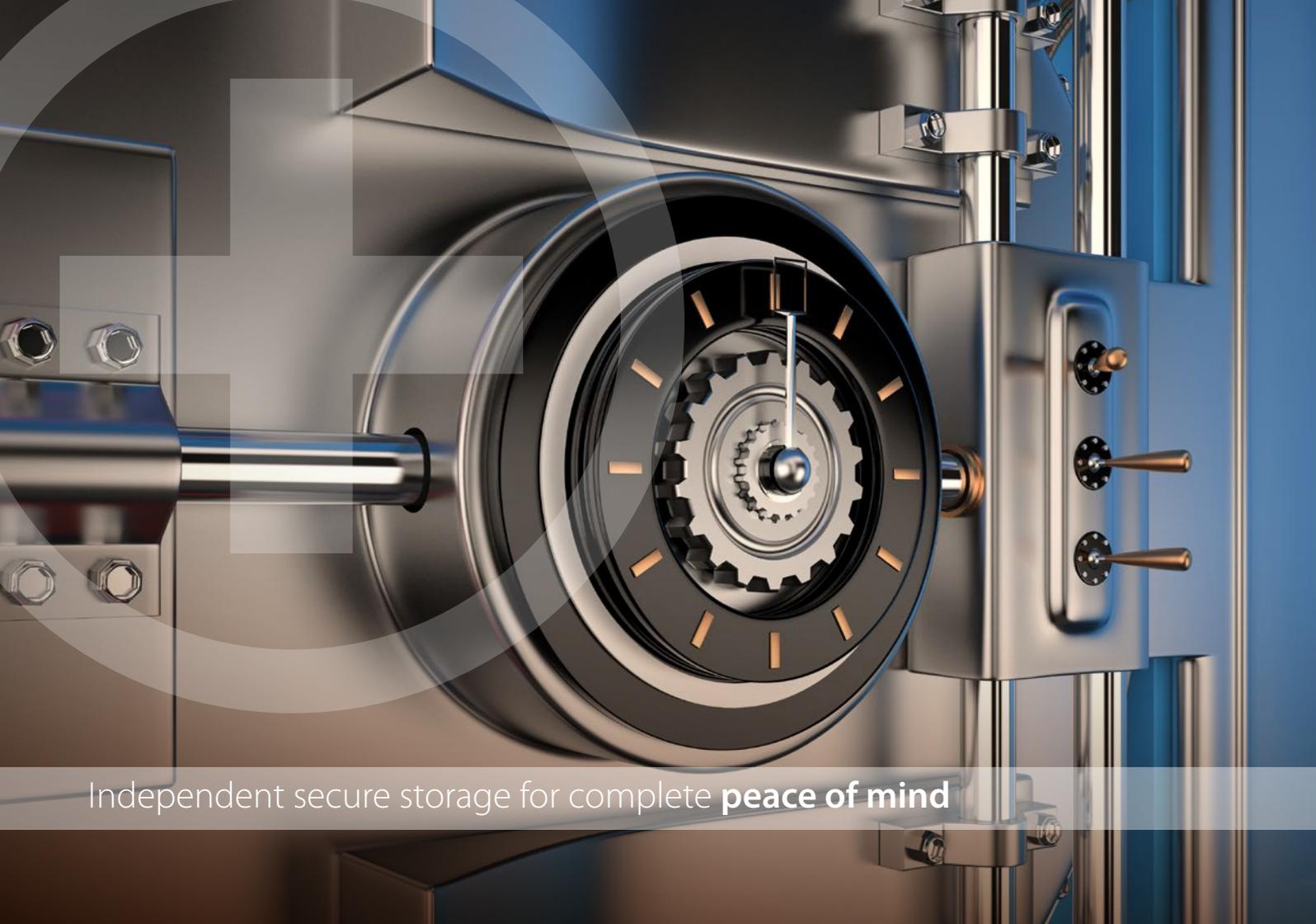


Client Care PLUS

- + Secure legal document storage
- + Ongoing reviews and updates
- + Probate assist

All designed to make life easier for you and your family



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

Making life easier for you and your family

Our Client Care 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. Free reviews and updates, so your Estate Planning documents are always up to date and fit for purpose
3. Probate Assist, reduce costs and stress for your family in the future, making life easier for those left behind



Helpline. Freephone number for you and any family member or friend to get advice and help at any time. **0800 781 6658**



Documents in your home are at risk



Don't take any chances

Secure 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 a probate solicitor 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.

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's 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.

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.

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.

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.

Make real savings with **Client Care PLUS**

- + **FREE consultation with a probate practitioner.** We have negotiated a FREE 1 hour consultation with an experienced Probate Practitioner. This allows the Executor(s) to get help, guidance and advice if they decide to do probate themselves.
- + **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 and fixed fees (rather than time costs, which can run out of control). 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 Executor(s). This service helps you deal with all initial matters and completing the complex Inheritance Tax returns needed to obtain a Grant of Probate.

Help when it's most needed with **Client Care PLUS**

Client Care PLUS

estplan.co.uk

Contact us today at:

Estate Planning Solutions

T +44 (0) 800 781 6658

E enquiries@estplan.co.uk

For more information please call one of our dedicated team of legal professionals FREE on: **0800 781 6658.**



PLANNING PROTECTION CERTAINTY