Working with EPS

Providing a first class Will writing and Estate Planning service for your clients

Estate Planning Solutions

PLANNING PROTECTION CERTAINTY

estplan.co.uk

I have been working with Paul and his colleagues for 5 years and have received excellent technical and personable service throughout. It's crucial for me to have confidence in other professionals when I recommend them to my clients. I have no reservations that Paul and his colleagues will provide my clients with first class advice and service, in keeping with the high STEP standards they comply with.

Clive Berry
Partner
Slaiyburn Financial Planning

Working with Paul Dodsworth of Estate Planning Solutions is a real pleasure. His knowledge, expertise and professionalism shines through at each client meeting we attend. I wholeheartedly recommend Paul and his team and I assure you that you will be in safe and highly competent hands.

John Eardley
Independent Financial Planner
Parsonage Financial

Referring your clients to us

Our offering:

- A first class service for your clients
- An experienced, qualified, professional consultant, dedicated to you and your clients
- Contact and appointment booking service
- Identify IHT planning and other financial planning opportunities
- Covered by our PII
- Seminars , webinars and marketing support
- Training for advisers and staff to identify opportunities
- Monthly industry news and case study via email
- Service Level Agreement
- Regular updates
- LinkedIn connections
- Online portal for referrals (coming soon)
- Structured two-way commissions, or two-way no commission agreement

Why choose EPS as your Estate Planning partner

2022 Will Writing firm of the Year (North & Midlands) - National Wills and Probate Awards

Excellent service delivery

- See what our clients say:
  Google reviews (4.9) / Trust Pilot (rated excellent)

Experience

- 20 years in business (Most Will writers are part-time and retire or leave after a few years)

Qualifications

- STEP (Society of Trust and Estate Practitioners) Diploma qualification
- IPW (Institute of Pofessional Willwriters)
- CTSI (Chartered Tradings Standards Institute) Code of Practice approved

Support

- Associated SRA regulated law firm for reserved legal work (Acer Prime Law)
- Chartered Tax Advisor (where necessary)

OVER 20
YEARS OF EXPERIENCE

20,000
WILLS WRITTEN

30,000
LPA's WRITTEN

1,500
TRUSTS ESTABLISHED

STEP ADVISING FAMILIES ACROSS GENERATIONS

Institute of Professional Willwriters • MEMBER •

tsi APPROVED CODE TRADINGSTANDARDS.GOV.UK

How we work with clients

Our approach to helping clients is based on our core principals:

- Acting professionally in everything we do
- Helping and guiding clients to make decisions
- Understanding client needs with empathy
- Avoiding legal jargon and speaking in plain English
- Acting in a timely manner
- Going the extra mile

Benefits to your practice

- Great service delivery to your clients
- Client retention - if you're not talking to your clients about Estate Planning, someone else is
- Retain funds under management
- Inheritance Tax planning opportunities
- Trustee Investment opportunities
- Futureproof your business by tying in your next generation of clients
- No cross selling

It's our consultative approach that sets us apart

1 When you refer a client to EPS we will contact them directly to arrange a consultation with one of our estate planning consultants. This consultation is at our cost and without obligation.

2 We will discuss their circumstances and identify their planning objectives, and explain all options available. If appropriate, we will send bespoke recommendations, tailored to meet their circumstances and objectives. If they choose to proceed, we take their instructions for the drafting of their documents.

3 Once instructed, we compliance check their file and draft and check their Wills and Powers of Attorney. Drafts are sent for client approval and a date is set for the final meeting. At the final meeting we explain all your clients documents in plain English to ensure they understand them and are are happy with them, before supervising the signing and witnessing. Once completed, all documents are returned to us for validity checking.

Our journey applies to all services

Will Trusts: Basic Estate Planning

Lifetime Trusts: Full Estate Planning

Wills: Your wishes ***after*** lifetime

LPA's: Your wishes ***during*** lifetime

Client Care: Ongoing long-term support

A typical client journey with Estate Planning Solutions

1. First meeting

- About us
- About you, your family and estate
- Identify Objectives
- Take instructions, or book 2nd meeting
- Send summary and recommendations

2. Second meeting

- Review, summary and recommendations
  - Questions, guidance and advice
- Take instructions
- Administration
  - Terms of engagement, payment, ID and proof of residence

3. Processing

- Compliance checking
- Document drafting
- Draft checking
- Draft approval (Drafts deemed approved after 5 working days)
- Engrossed documents pack prepared and sent

4. Attestation

- Signing and witnessing
  - Explain in plain English
  - Guidance on signing and witnessing
- **Not all firms do this**

5.Validity checking

- Check all documents are signed and witnessed correctly
- **Very few firms do this**

6. Admin.

- Storage of documents
- Attorney administration
- LPA registration
- Trust completion and property transfer
- Trust registration and reviews

7. Client Care

- Client Care PLUS service
  - Safe secure storage
  - Reviews
  - Updates
  - Probate Assist

8. Reviews and updates

- Newsletters - twice yearly
- Regular reviews
- Guidance and advice
- Ongoing support

Contact us

If you are interested in becoming an EPS introducing Partner please send an email to enquiries@estplan.co.uk

Alternatively call:

Paul Dodsworth 07834 488 757

Nadine Abrahams 07771 360 120

Speak to us today and join our network of dedicated professionals

* Estate Planning Solutions is the trading name of Holistic Estate Planning Solutions Ltd. (Registered in England and Wales 4321172) **Paul Dodsworth is a full member of the Society of Trust and Estate Practitioners (STEP) Membership No. 202808**

Google Reviews 4.9

Rated EXCELLENT by Trustpilot

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