



**ALPHA LEGAL – SIMPLE WILL  
USER GUIDE**

**Version 1.0**



# DOCUMENT CONTROL

## Document

Alpha Legal – Simple Will User Guide
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## Current Version

Version	Date	Issued Pages	Reason For Issue
1.0	Oct 2023	All	First issue

## Previous Versions

Version	Date	Issued Pages	Reason For Issue

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# 1. INTRODUCTION

## 1.1 Welcome

Congratulations on signing up for Simple Wills on Alpha Legal! This user guide will get you up and running quickly.



*The Write A Will feature is available to Alpha Legal users with a Branded subscription or higher who are also active Countrywide Tax & Trust (CTT) Group members. Active CTT membership is required to receive Will-writing advice from CTT.*

*CTT can assist you with any technical Will-writing queries that you may have. They can support and advise you, answering any legal queries that arise.*

To get started, all you need to do is:

- sign in
- ensure your Alpha Legal profile is linked to your CTT account.

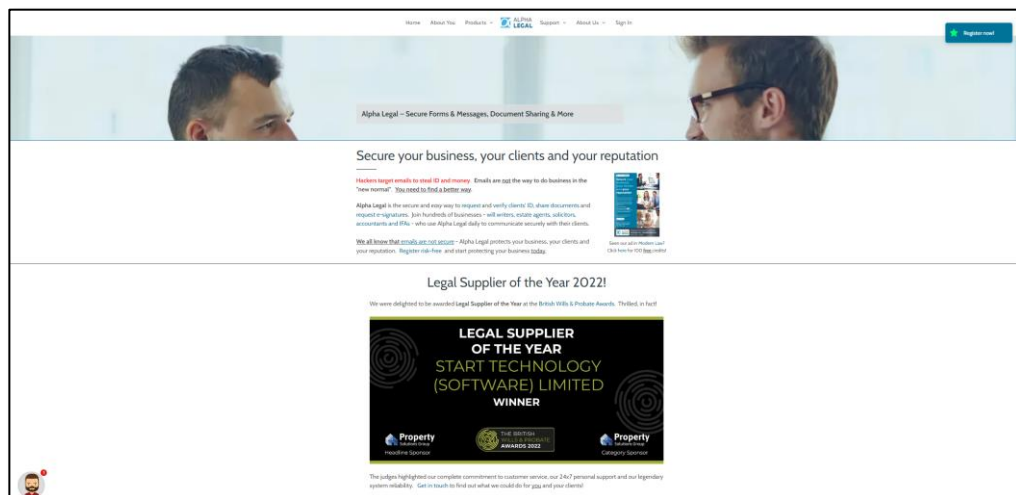
You can then use the Write A Will feature to complete the sections of the Will, view a summary and generate a preview and/or final document.

## 1.2 Signing in

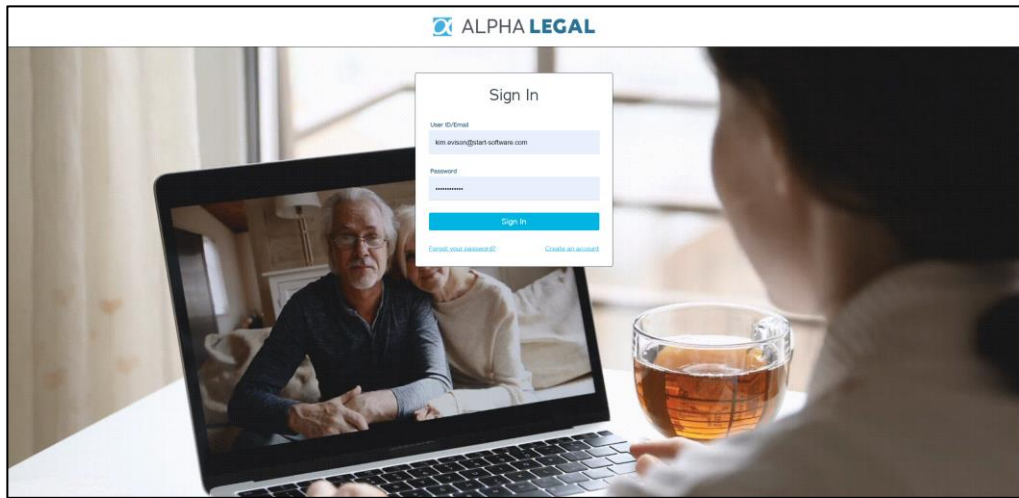
Sign into Alpha Legal by going to this webpage:

[alphalegal.co.uk](http://alphalegal.co.uk)

The Alpha Legal website is displayed.



Select the **Sign In** option from the menu at the top of the page.



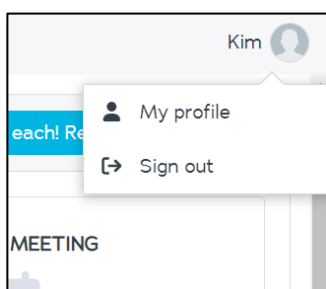
Enter your Alpha Legal username (usually this is your email address) and password and click **Sign In**.

If you forget your password, there is a “Forgot your password?” option under the **Sign In** button to help.

Once signed in, Alpha Legal opens.

## 1.3 Signing out

The Sign Out option is available by clicking on your profile picture in the top right-hand corner of the screen.



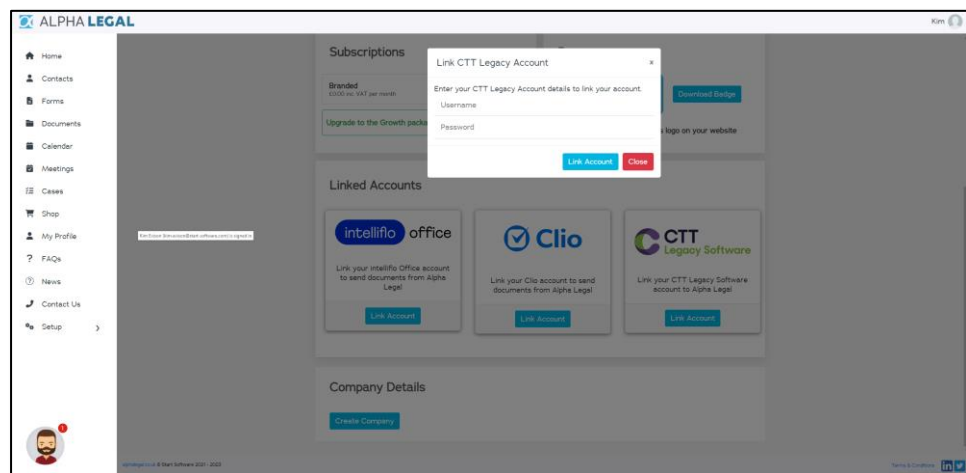
Select the **Sign Out** option to sign out and return to the home page.

You return to the Sign In page.

## 1.4 Linking your account

The Write a Will feature requires you to be an active CTT member. This section describes how to link your Alpha Legal profile to your CTT account so that you can use the Write A Will feature.

1. Click your profile picture in the top right-hand corner and select the **My Profile** option. Alternatively, select **My Profile** from the menu.
2. Scroll down to the Linked Accounts section and click the **Link Account** button on CTT Legacy Software.



3. Enter your username and password for your CTT Legacy account, then click **Link Account**.
4. Return to the Alpha Legal home page by selecting the **Home** option from the menu.



*CTT can assist you with any technical Will-writing queries that you may have. They can support and advise you, answering any legal queries that arise.*

## 2. WRITING A SIMPLE WILL

This section describes how to use the Write a Will option on Alpha Legal, to get started with the Will and complete the various sections.

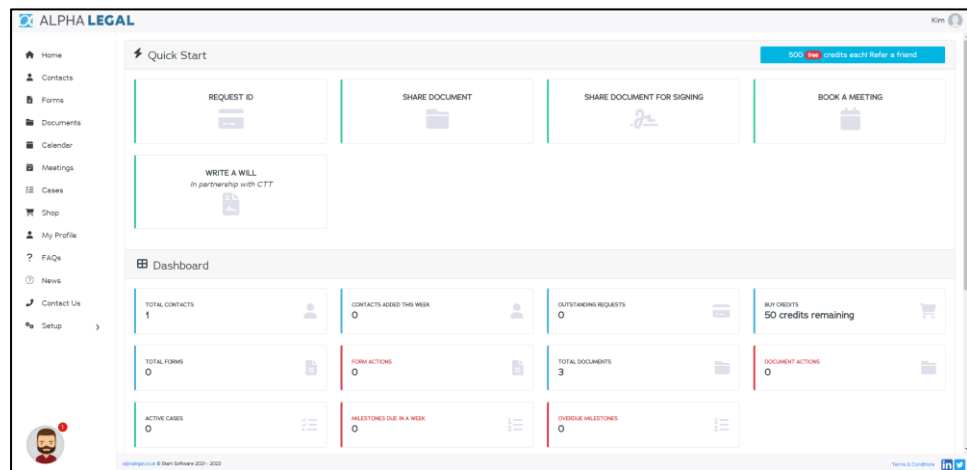
### 2.1 Getting started with a simple Will

To start writing the simple Will, you need to be signed into Alpha Legal.



See Section 1.2, Signing in, for instructions on how to sign in.

1. Click the WRITE A WILL button on the Quick Start tile on the homepage.

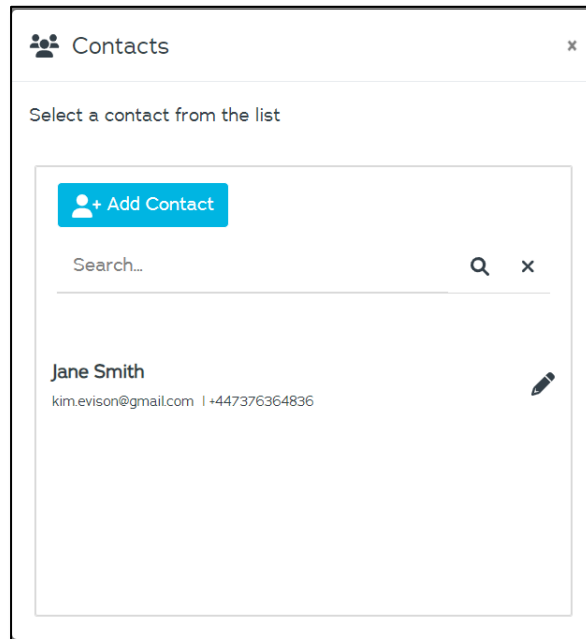


You are prompted to either create a contact (for the person making the Will) or search for and select an existing contact.



*Did you know... a person making a Will is called a testator if they are male or a testatrix if they are female!*

*In this document we will refer to the testator/testatrix as the "client" to keep things simple.*



2. Click on an existing contact to select them as the client. You can use the **Search** field to help locate a specific contact. Alternatively, click **Add Contact** to enter details of a new contact.

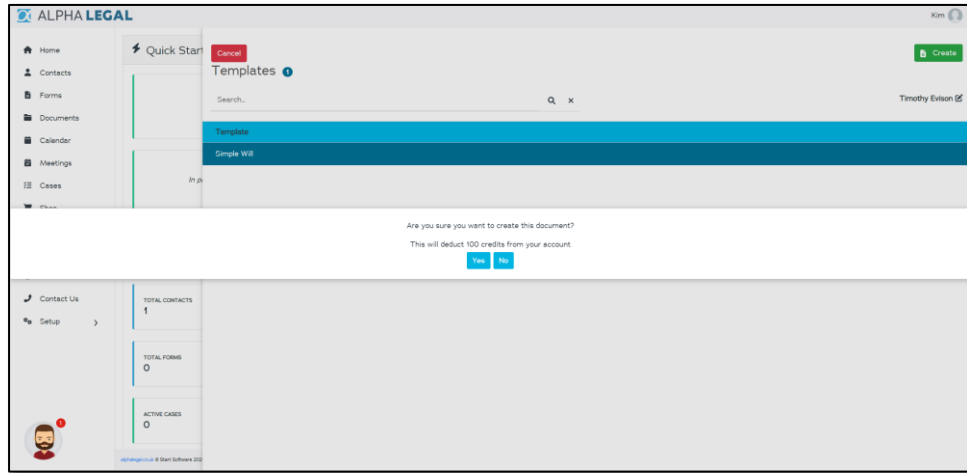
If you are adding new contact details, complete their Title, First Name, Surname, Email Address and Mobile Phone Number, then click **Save**. All fields are required.

A list of the available Will templates is displayed, this may include only “Simple Will” or perhaps other options if you write Wills for other countries.

3. Double click on Simple Will to select it.



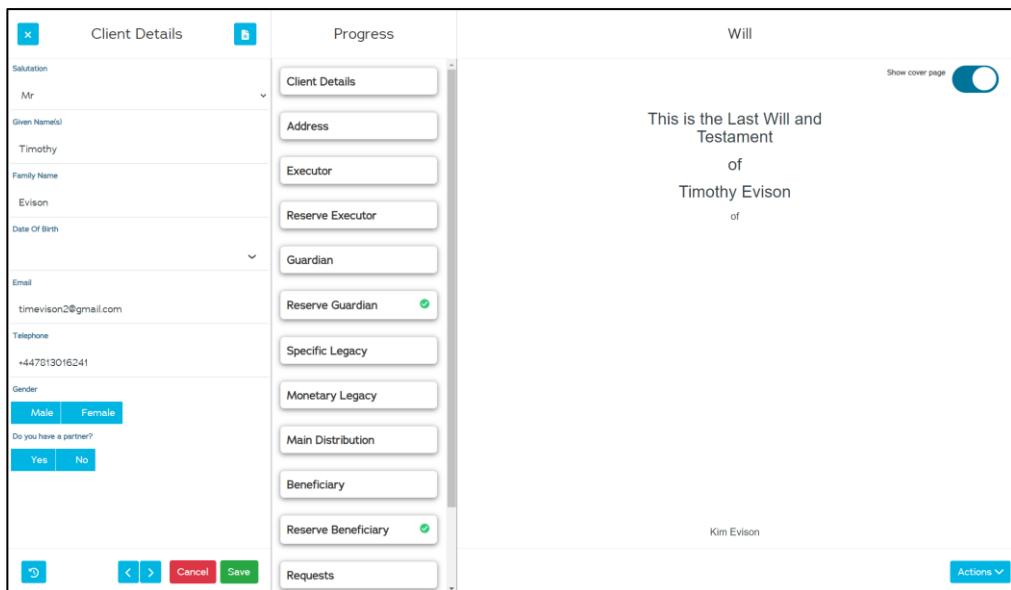
A message advises you of the number of credits that will be deducted from your account if you continue and create the simple Will (currently 100 credits).



4. Click **Yes** to continue and start creating the Will.

## 2.2 Entering the Will details

Once you have started creating the Will, you are presented with a number of sections to be completed. You work through each of the sections in turn. The first section concerns the client details – these are displayed in the left-hand panel on the screen. The sections are displayed in the Progress area of the screen – in the centre panel – and are ticked as you work your way through. The Will itself is generated and built up as you answer questions; it is displayed in the right-hand panel on the screen.



## 2.2.1 Confirming the client details

The first section concerns the client details. Initial details are displayed from when you created the client. Complete any missing details and answer the questions.

1. Complete any missing details, eg the **Date Of Birth**.
2. Select the **Gender**.
3. Indicate whether the client has a partner. If you answer Yes to this question, then there will be a supplementary question in this section for you to answer and a Partner section will be added.
4. Answer any further questions.

5. Click **Save**, if you wish to save the details at this point, and the right arrow to display the next section, Address.

## 2.2.2 Completing the remaining sections

Complete the fields displayed in each of the sections in turn, using **Save** to save your entries at any point and the right arrow to move on to the next section.

The remaining sections are:

- **Address**  
Enter the client's address and postcode.
- **Partner** (if you previously answered yes to the client having a partner)  
Enter the partner's personal details, including name, contact details and relationship.
- **Executor**  
Nominate the executors, who will ensure the Will is executed when the client dies, which may include Countrywide Tax & Trust Corporation as professional executors, the partner (jointly or solely) and any other person(s) such as friends or family.  
Add further executors by using the plus button at the bottom of the section.



**Tip:** Executors are often the partner of the client, but it is a great idea to have a professional executor to help in a difficult situation.

- **Reserve Executor**  
Nominate any reserve executors to act if none of the executors are available.  
Use the plus button at the bottom of the section to add reserve executors.



**Tip:** Reserve executors are often the client's adult children.

- **Guardian**  
Enter details of the person(s) to act as guardian and look after the children in the event of the client's death if the client has children who are minors.



**Tip:** Remind your client to talk to the person(s) they are nominating as guardian before including them in the Will. Guardians can refuse!

- **Reserve Guardian**  
Enter details of any reserve guardians to act if none of the guardians are available.
- **Specific Legacy**  
Detail the individual gifts to be left to specific people such as family and friends or to a charity.  
Specify the person and relationship, or charity, and the item.



**Tip:** Examples of a specific legacy would be "my gold watch" or "my golf clubs". Be specific to avoid any confusion!

- **Monetary Legacy**  
Detail the gifts of money to be left to specific people or charities.  
Specify the person and relationship, or charity, and the amount.
- **Main Distribution**  
Specify who is to receive the remainder of the estate once the specific and monetary legacies have been distributed.  
Prompts include the partner who may be given priority, the children (at a specified age) and named people.  
Percentage splits between named people can be specified.
- **Beneficiary**  
If named people are to have the main part of the estate, then use this section to specify those people or charities.
- **Reserve Beneficiary**  
Specify any reserve beneficiaries to receive the remainder of the estate should none of the above survive the client.



**Tip:** The reserve beneficiary is typically a charity.

- **Requests**  
Specify whether the client wishes to be cremated, buried etc, and any specific requests they have for the funeral.



**Tip:** Requests are not legally binding; they are just an expression of wish. Clients usually expect to be able to put requests in the Will.

- **Intentional Exclusions**

If any people are to be specifically excluded from benefiting from the Will, people who might otherwise have a claim on the estate, then enter their details to make it clear that their exclusion has not been accidental.



**Tip:** Specifying an intentional exclusion does not stop the person challenging the Will. It is therefore good practice to be specific in the reason why the person is being excluded. If you do not give a clear explanation, they have a better chance of making a successful claim.

## 2.3 Displaying the Will summary

The final section in the simple Will is the Summary. This section displays a summary of the answers given to each of the preceding sections for you to check.

The screenshot shows the 'Summary' page of the Alpha Legal software. The page is divided into three main columns:

- Summary (Left):** Contains a summary of the will information for the testator (Timothy Evison) and partner (Kim Evison). It lists details such as name, address, relationship, and appointments. At the bottom, there are buttons for 'Send to Contact' and 'Mirror Will'.
- Progress (Middle):** A vertical list of sections with progress indicators (green checkmarks or empty boxes): Address, Partner, Executor, Reserve Executor, Guardian, Reserve Guardian, Specific Legacy, Monetary Legacy, Main Distribution, Beneficiary, Reserve Beneficiary, Requests, Intentional Exclusion, and Summary.
- Will (Right):** Displays the draft text of the will, starting with 'This is the Last Will and Testament of Timothy Evison of Mayflower Cottage, The Row, Much Wenlock, Shropshire TF13 6AA'. It also shows the executor's name, Kim Evison, and the Alpha Legal logo.

At the bottom of the interface, there are navigation buttons: '<', '>', 'Cancel', 'Save', and 'Actions'.

You can send this summary to the client for them to review – **Save** the Will details and click the **Send to Contact** button at the bottom of the summary.

If you are preparing a Will for a client with a partner, then there is also a button available that allows you to quickly create the **Mirror Will** for the partner.

## 2.4 Generating the Will

The Will is generated as you answer the questions in the sections and is displayed on screen in the right-hand panel. You can see it being built up as you enter information, and you can see how the changes you make to the answers directly affect the content of the Will.

The **Actions** button in the bottom right of the screen gives you further options for the Will. You can:

- download a preview PDF so that you can check the content
- generate a final Will for printing and signing with the client
- send the contact for referral to someone else if the client has complex needs.



*Make sure you **Save** all your changes before closing the Will screen.*

### 3. EDITING A WILL

You can edit a Will at a later date if required.

1. Find the contact in the **Contacts** section of Alpha Legal and click on the contact.
2. Go to the Documents tab where the Will you previously created will be listed.
3. Double click on the Will to display a menu from which you can select **Edit**.

The Will is then displayed on screen and can be edited as necessary. You can change any of the details and you can regenerate the Will.



*Make sure you **Save** all your changes before closing the Will screen.*

## 4. REFERRING A CONTACT

You can refer a contact by using an option from the **Actions** button in the bottom right-hand corner of the screen. A contact can be referred to:

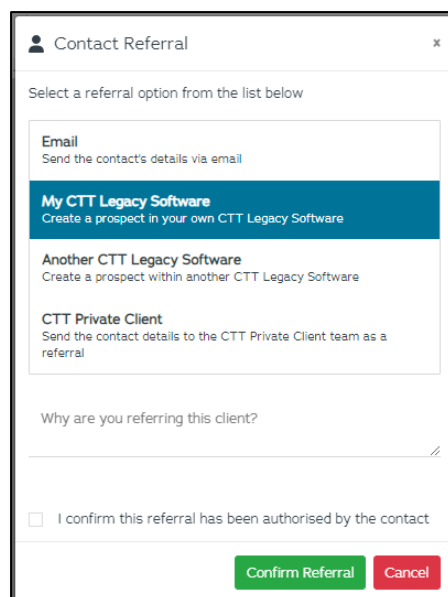
- anyone by email
- your own prospect bank in the Legacy Software
- someone else in your organisation through the Legacy Software
- the CTT Private Client Team if their needs are complex.

To refer a contact:

1. Select the **Send Contact for Referral** option from the **Actions** button.

A window is displayed with four referral options:

- **Email** – this is the simplest way to send on the client’s contact details
- **My CTT Legacy Software** – this creates a prospect in your own Legacy Software
- **Another CTT Legacy Software** – this creates a prospect in another (specified) Legacy Software
- **CTT Private Client** – this sends the client’s contact details to the CTT Private Client Team via the Legacy Software.



2. Select the required referral option.
3. Explain why you are referring the client.
4. Confirm that the client has authorised the referral.
5. Click the **Confirm Referral** button.

If you selected **Email** then an email will pop up for you to enter the email address of the person you are sending the details to.