Whitehead Monckton
the Kent law firm

Standard Will Service

Specialist services from the
Tax and Estate Planning Department

Whitehead Monckton
the Kent law firm

Overview

At Whitehead Monckton, we think it is important to talk to our clients about succession and tax planning, at the same time as helping clients with their Wills. However, we recognise that sometimes a “standard” Will is all that is needed.

It may be that you are off on holiday and simply don’t have the time to commit to a more detailed conversation, but will come back to talk to us about succession and tax planning upon your return. Or, it may be that you have just bought a house or got married and now need your first Will. Whatever the reason, we have developed the “Standard Will Service” to provide you with a simple Will at a fixed cost.

The Standard Will Service is intended to provide you with a straightforward Will, enabling you to include provisions for the distribution of personal effects, expressing your wishes for your funeral and if relevant appointing guardians, as well as the straightforward distribution of your assets to your beneficiaries.

Examples where it can be appropriate are:

- A couple wish to leave everything to each other or to their children (equally) on the second death
- An individual wishes to leave his or her estate to certain named beneficiaries

As part of the “Standard Will Service” we will always include funeral wishes and the appointment of guardians for your children where appropriate.

It is still vital to ensure a “Standard” Will reflects your wishes and enables your executors to administer your estate, so professional advice from experienced lawyers is key to this.

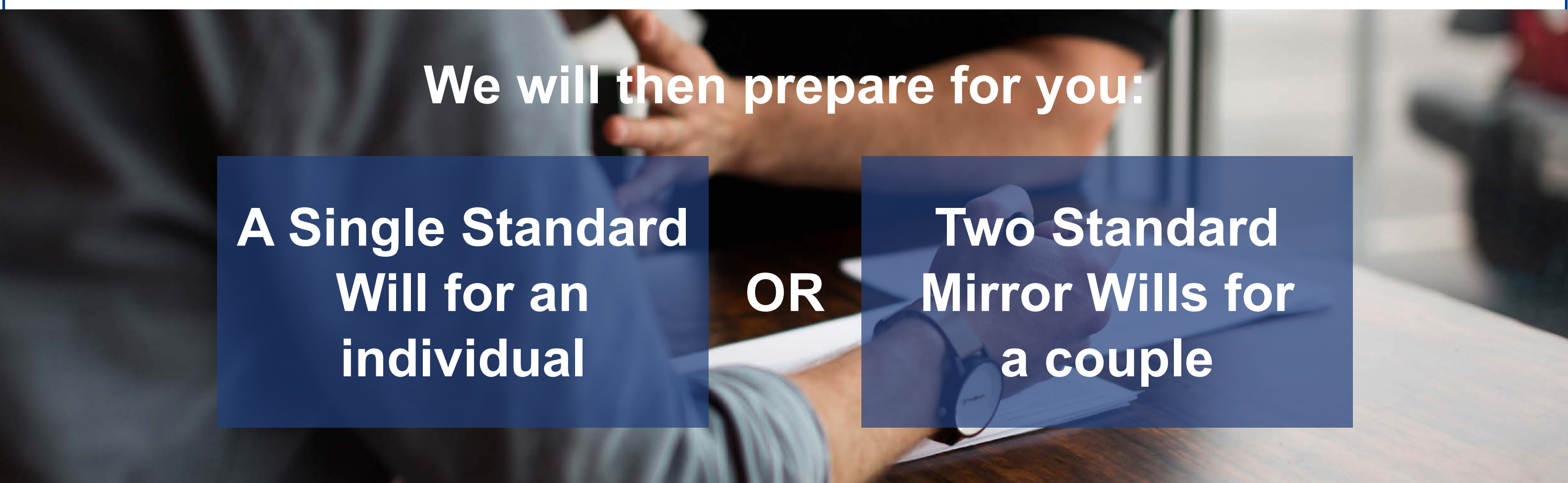
What happens next?

Please click here to complete the
Standard Wills Questionnaire to start the process.

When we have received your questionnaire, we will contact you to arrange the initial meeting to discuss your instructions. You will meet with with one of the experienced members of our Tax and Estate Planning Team who will prepare your Will with you.

In some circumstances a Standard Will may not be appropriate and if this is the case, we will advise you and suggest that you may benefit from our Succession Planning service. You can then make an informed decision as to how you want to proceed.

If you decide that the Standard Will Service is your preferred option but you would like further discussion or advice on any of the issues covered in the “Service Selection Questions”, then a separate charge will be made on top of the Standard Will cost. If following the discussion you opt for our Succession Planning Service, a fixed cost will be provided for the selected package, instead of the Standard Will Service price.



We will then prepare for you:

A Single Standard Will for an individual

OR

Two Standard Mirror Wills for a couple

Drafts will be sent to you for your approval and then we will arrange the final meeting to sign the Wills.

In some circumstances you may wish to expedite the process by simply providing instructions via the questionnaire and email without the initial meeting, which can be possible, or we can conduct the initial meeting by telephone. We do need to meet with you to sign the Wills so we can satisfy our professional obligations and ensure the validity of your Wills.

Whitehead Monckton
the Kent law firm

Legal Review Programme

As previously mentioned, it is imperative to keep your Will under regular review. To assist with this, we have developed the **Legal Review Programme,** a unique service offering clients ongoing support and guidance.

We recommend that every client who completes a Will with us joins our programme, to enable us to provide you with the best possible service and peace of mind. Once you have made your Will, circumstances will change, both financially and personally, and keeping your Will under review is the best way of ensuring the investment you have made now in your future remains relevant.

As a Standard Assurance LRP member you will receive:

- 1st year Standard Legal Review Programme membership
- An annual review letter relating to your Will and Powers of Attorney
- Newsletters from us and invitations to our seminars and workshops
- A discount on our fees in respect of future Will instructions
- Preferential rates for your Executors for our Probate and Estate Administration services
- A discount on upgrading to our Succession Planning Service

See the **Legal Review Programme brochure** for more information and details on the benefits and options available and the costs of this programme.

Lasting Powers of Attorney ("LPAs")

We are happy to offer all Standard Will clients a 10% discount on our standard LPA fees when instructions are given and all documentation is completed at the final meeting. Please visit our **Lasting Powers of Attorney** website page for further details. If you wish to proceed with this, then please complete the questionnaire below including the LPA section.

Whitehead Monckton
the Kent law firm

Our Offices

1

Maidstone
5 Eclipse Park
Sittingbourne Road
Maidstone
Kent
ME14 3EN

T. 01622 698000
F. 01622 690050

2

Tenterden
3-4 Market Square
High Street
Tenterden
Kent
TN30 6BN

T. 01580 765722
F. 01580 765180

3

Canterbury
32-33 Watling Street
Canterbury
Kent
CT1 2AN

T. 01227 643250
F. 01227 643260

4

Canary Wharf
2 Beatty House
Admirals Way
London
E14 9UF

T. 020 7531 2990
F. 020 7531 2992

enquiries@whitehead-monckton.co.uk

With offices in Maidstone, Tenterden, Canterbury and Canary Wharf, Whitehead Monckton has grown to be one of the largest legal practices in the area.

We balance our practice between our business and personal clients. This ensures that every single client will receive the very best advice, support and quality of work, no matter what their background, tailored to their specific needs.