Whitehead Monckton
the Kent law firm

Succession Planning Service

Specialist services from the
Tax and Estate Planning Department

Succession Planning Service

Having completed the **"Service Selection Questions"**, you have answered yes to at least one of the more complex situations that has directed you to this service rather than our Standard Wills Service. The Succession Planning Service is designed for clients who wish to protect their wealth and/or family succession arrangements.

Using our extensive experience of family succession dynamics, we have developed a number of bespoke packages tailored to address common concerns for our clients.

Our expertise has enabled us to prepare case studies to assist you in identifying the most suitable package for your individual circumstances.

Please click here for case studies

Having looked at the case studies, you will hopefully have a greater understanding of the various situations that can be addressed through our Succession Planning Service, and how we can help you and your family.

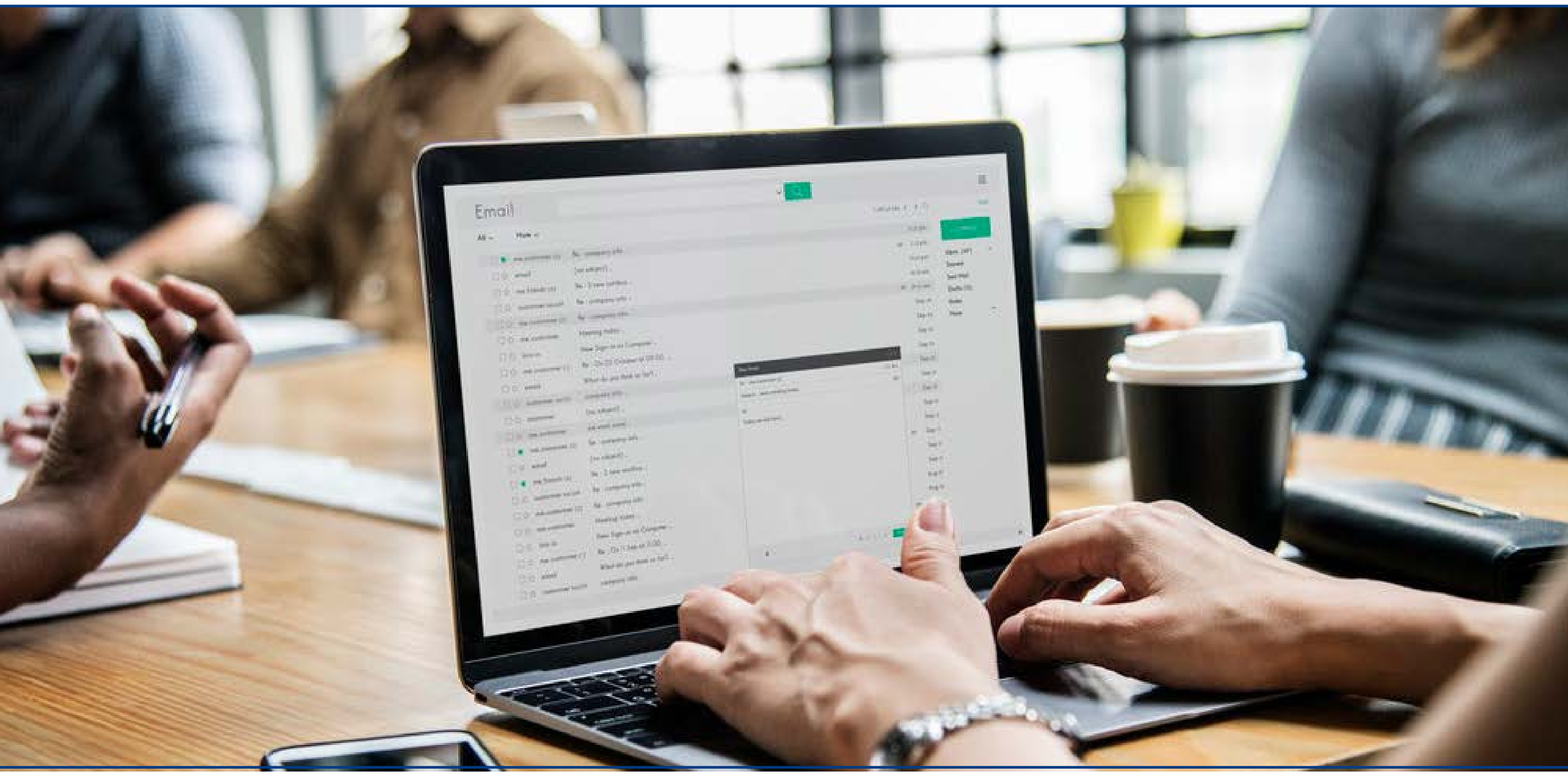
What happens next?

Please click here to complete the
Succession Planning 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 one of the experienced members of our Tax and Estate Planning Team who will take time to understand your situation and objectives for your Succession Planning. We will provide detailed and bespoke advice and prepare your Will and any accompanying documents with you. We will also provide you with inheritance tax and care fees planning advice if appropriate and required.

You may have chosen which Succession Planning Package you feel best suits your circumstances having reviewed the case studies. In our meeting we are happy to take our time to explore the various options with you and ensure you receive the advice you need, and can make an informed decision as to how you wish to proceed, and what package is right for you.

After the initial meeting we will send you the draft documentation relevant to your package and instructions, for you to review, either electronically or in the post, whichever is most convenient.



We will then discuss any questions you may have, or make any necessary amendments to the documents. Once you are happy with the drafts, we will arrange the final meeting to sign the Wills and accompanying documents.

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Family Protection Package

Is it right for me?	What is included
If you have: • Complex family or financial circumstances. OR If you want: • To exercise maximum control over your estate in the future. • The greatest flexibility. • Tax saving opportunities. Then this is for you.	• Flexible Will(s) containing comprehensive and tailored Trusts specific to your circumstances on first and/or second death. • Bespoke Letters of Wishes to address family circumstances and tax considerations. • Advice on and severance of joint tenancy of property. • Inheritance tax planning and advice. • Care fees planning and advice • 1st year Complete Legal Review Programme membership. • 20% discount on LPAs.

Please see Peter & Linda and David & Eleanor case studies.	**Prices (all plus VAT)**	**Couple**	**£3,500**
		Individual	**£2,500**

Estate Protection Package

Is it right for me?	What is included
If you have: • A blended family with step children. • Concerns about your spouse remarrying after your death. • Concerns over leaving your estate directly to your children. Then this is for you.	• Mirror Wills containing flexible trusts on either the first or second death. • Advice on and severance of joint tenancy. • Bespoke letters of wishes. • Inheritance tax planning and advice. • Care fees planning and advice. • 1st year Complete Legal Review Programme membership. • 20% discount on LPAs.

Please see Samuel & Emily and Rodney & Kelly case studies.	**Prices (all plus VAT)**	**Couple**	**£1,950**
		Individual	**£1,350**

Home Protection Package

Is it right for me?	What is included
If you want to protect half the value of your family home from care fees and ensure it passes to your chosen beneficiaries then this is for you.	• Mirror Wills incorporating a trust over half the property. • Advice on and severance of joint tenancy. • Simple inheritance tax information. • Care fees planning and advice • 1st year Standard Legal Review Programme membership. • 20% discount on LPAs.

See Brian & June case study.	**Prices (all plus VAT)**	**Couple**	**£1,450**
		Individual	**£950**

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.

Every Standard Assurance LRP member of the programme will receive:

- 1st year Standard Legal Review Programme membership
- An annual review letter relating to your Succession Planning arrangements
- 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 within our Succession Planning Services

Complete Assurance LRP members will receive all of the above, plus:

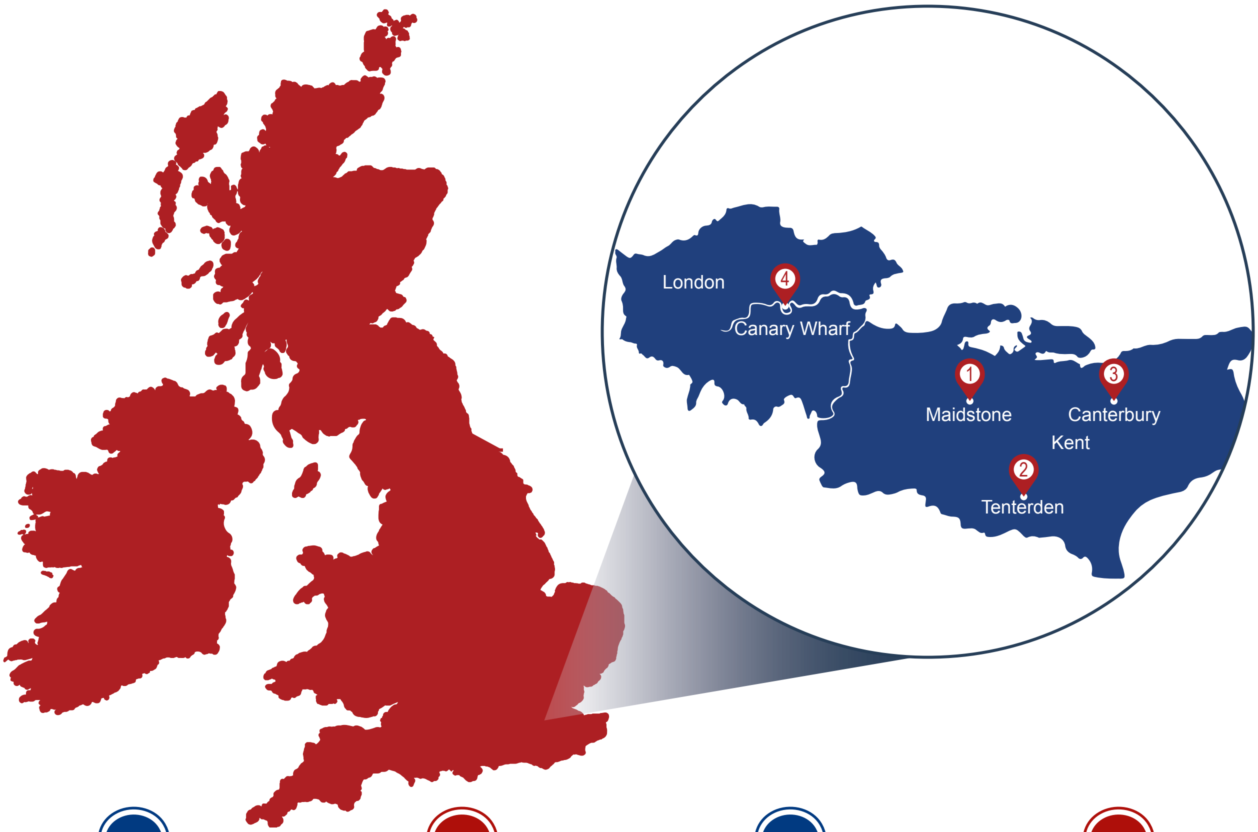
- Annual review meeting with your lawyer
- Inclusive updates to your Succession Planning documents
- Unlimited email consultations on your Succession Planning affairs

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 Succession Planning Service clients a 20% 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.

Our Offices



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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.