Estate Planning

Becoming a Client

ProTrust Estate Planning

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Whether it is one piece of advice, a Will to prepare or an ongoing service of review and updates, we are here to help.

Advice Work

This may be a question regarding an existing Will, or a wish to discuss the use of Will-trusts or mitigating the effects of Inheritance Tax.

Including:

- Checking your existing Wills or trusts to see that they are current and up to date with the law and your wishes/circumstances;
- A discussion on the merits of Lasting Powers of Attorney and Living Wills;
- A discussion on how trusts are used within Wills and the advantages and disadvantages of including such a structure;
- A discussion on your current Inheritance Tax position; or
- A discussion on how best to own/hold joint property between husband/wife to maximise protections and allowances;

Transaction Work

This is usually involving the preparation of documentation or completion of a process.

Including:

- Preparing fresh Wills or Lasting Powers of Attorney
- Preparing a working calculation schedule of likely Inheritance Tax that would be payable by your family;
- Arranging for other matters such as trusts, property transfer work.

Ongoing Servicing (Reviewing and Updating)

This is a more involved process of ongoing maintenance of your estate planning requirements. There can be many reasons for requiring the peace of mind of the regular review process. Primarily, it is to ensure that your documents remain legally valid and up to date. Secondly, it is to refresh your own memories as to how things are structured. Thirdly, it can provide an opportunity for you to review your own family circumstances and wishes and to make alterations and updated changes. Fourthly, it is an opportunity to review any taxation issues (changes in legislation).

Including:

- Refresher meetings (annually or as otherwise agreed with you) as to the reasons and structure for your Will-trusts;
- Review of existing documentation; Wills and trust documents and making suggested updates;
- Review of current tax and legislation;
- Reviewing your own circumstances and wishes;
- Reviewing trustees and executors – their roles and responsibilities in administering your Wills/trusts.

As to how we work with you, the choice is yours.

Becoming a client

We would love you to be a client of the firm for the longer term rather than one transaction or piece of advice. For us, it is part of the enjoyment of our job to speak with our clients who have come back to us regularly for advice and assistance. Regularity and continuity allows us to provide the very best advice and help to you. Hopefully, you will see the benefit of this also in learning to trust us and feel comfortable with being able to share information with us that can help your estate planning. Such matters are often sensitive in nature, including family or financial circumstances. Therefore, build a relationship with us based on trust and experience ought to be beneficial to you also in terms of your peace of mind and enjoyment of the process. One of our aims is to act for clients who are referred and recommended to us by our existing clients and/or their other professional advisors. To achieve this requires trust over the longer term. Trust in our service and in our care and willingness to assist you.

What you can expect from us

- Expertise and experience in the use of trust structures within Wills and Estate Planning.
- Fast and reliable service.
- A sensible, structured approach to reviewing your arrangements so that you are kept up to date.
- Transparency: from taped meetings of advice, to transparent fixed fee cost options for each and every type of work we undertake.
- Expert knowledge of other good professionals such as financial advisors, solicitors, accountants and for property conveyancing. We can point you in the right direction based on experience of what it takes to be a trusted advisor.
- The drive to always exceed your expectations and such that you may recommend our services to your friends, family and connections.

What are we striving to achieve for you?

- To impart our knowledge to you so that you are enthused in taking your Estate planning matters seriously
- To provide you with an open mind as to flexibility of options for best meeting your needs and wishes
- To be honest and straightforward in our communications with you so that you are likewise open and transparent with us so we can best achieve your aims
- To have open dialogue so that you are free to give valuable feedback to us on our service
- To give you the trust and faith in our advice and strategy so that you help us help you to work within time frames and next stages we plan with you
- To encourage willingness for reviewing your Estate planning at regular intervals.

Contact Us

For more information and for an initial discussion for advice please contact us on:

Email: info@protrustconsulting.co.uk

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