

Discounted Package Offers

Do you have Power of Attorney and the CORRECT Will in place?

To help our clients in these challenging times, South Coast Legal Services are currently offering a range of estate planning packages for Will and Lasting Power of Attorney at **discounted rates!**

Our services are available weekdays during the daytime or evening and include a FREE first meeting either at our office, by video call (Zoom) or telephone to discuss your requirements and our standard recommendations. Chargeable home* visit meeting(s) are also available (*within 40 miles of our Chichester Office excluding IOW, restrictions apply).

For asset protection strategies, please look at options B, C & D (see below).

The once-popular **Property Trust Will** is still available (Option B), but since the introduction of the **'Flexible' Trust/Estate Planning Will** (available on Option C & D), the Property Trust Will is now no longer recommended. This is because the 'Flexible' Trust/Estate Planning Will offers the best of both worlds (by using Discretionary Trusts) for flexible asset protection, whilst also utilising the Nil Rate Band (NRB) and Residence Nil Rate Band (RNRB) tax allowances. Option D also benefits from the interest in possession married/civil partnership exemption. Married/civil partner couples over the current Nil Rate Band should look at Option 'D', everyone else (single & non-married/civil couples) should look at Option 'C'.

The discounted package options shown are based on our Services/Price list. So, a Standard/Basic Will is based on Section 1 (S1), Trust(s) available within the Will are based on (S3), Lasting Power of Attorney is based on (S4.2 & S4.3).

To use our services, you must be over 18 and have capacity. Additional fees may also apply, please see our full price list (v250120)

	<u>Single</u>	<u>Double/Couple</u>
A. <u>Basic Will</u> Standard/Basic Will - Includes Document Commentary & Clarity Statement <u>Discounted Rate</u>	£150.00 £130.00	£250.00 £220.00
B. <u>Property Trust Will - Discounted Package (1 Trust per Will)</u> Standard Will - Includes Document Commentary & Clarity Statement With Property Trust (Right to Reside/Life Interest/Protective Property Trust) <u>Discounted Rate</u>	£650.00 £450.00	£1,250.00 £650.00
C. <u>'Flexible' Trust/Estate Planning Will - Discounted Package (1 Trust per Will for Small/Medium Estate)</u> Standard Will - Includes Document Commentary & Clarity Statement With Discretionary Trust of Residue (Including NRB & RNRB) <u>Discounted Rate</u>	£800.00 £500.00	£1,550.00 £750.00
D. <u>'Flexible' Trust/Estate Planning Will - Discounted Package (2 Trusts per Will for Medium/Large Estate)</u> Standard Will - Includes Document Commentary & Clarity Statement With Nil Rate Band & Residence Nil Rate Band Discretionary Trust (NRB & RNRB) With Interest in Possession Trust of Residue <u>Discounted Rate</u>	£1,300.00 £650.00	£2,550.00 £1100.00
E. <u>Lasting Power of Attorney - Discounted Package (Unregistered, Supply Only)</u> Lasting Power of Attorney - Property & Financial Affairs and Health & Welfare <u>Discounted Rate</u>	£600.00 £450.00	£1,200.00 £700.00
<u>Recommendation Report (via Client Portal)</u> Recommended Service <input checked="" type="checkbox"/> Estate Planning/Recommendations Report (Single or Couple)	£200.00 Less 50% £100.00	

