

Will Writing as a Flexible Benefit

Why you need a Will?

Without a valid Will, the Government decides what to do with your assets

You will need a Will if you answer YES to any of the following:

- Have more than £5,000 in assets
- Own property
- Have children or are thinking of starting a family
- Living as unmarried partners or planning to marry
- Separated from spouse
- Concerned about Inheritance Tax

Benefits of Writing a Will

- Ensure your children are cared for by the people you want to look after them
- Ensure your assets go to the people you want to leave them to and at the right age
- Ensure that your estate is looked after by your nominees
- Reduce possible unnecessary distress, financial difficulties, lengthy and expensive legal proceedings and exposure to Inheritance Tax for your loved ones

Writing your Will, the James McKenzie Way

Step 1



Meeting with your Specialist Consultant

This can be over video, phone, or face to face (where possible) to discuss your personal situation and requirements to create a bespoke Will to accurately reflect your wishes.

Step 2



Preparing your Will

The draft versions of your Will will be sent within two weeks of all information being received and reviewed.

We have multifactor authentication for document access to ensure privacy and security.

Step 3



Finalisation of Wills

Upon acceptance, the final versions of your Will are printed, bound, and posted with full signing instructions.

This will become your legally binding Will.

We offer Single and Joint Wills that include the following:

- Appointment of Executors, Trustees and Guardians
- Use of legacy and residual gifts
- Simple Trusts for minor children
- Generic Inheritance Tax advice
- Planning for foreseeable life events

Our Wills are 'Priced for Life' - We promise to ensure longevity in the Wills that we draft, considering all foreseeable life events with a cost efficient and simple process to change your Will should the need arise.

Our services and costs are paid over 12 months and are inclusive of VAT. Below are the different options:

Service Benefits & Inclusions	Standard Single Will £234 (£19.50 per month)	Standard Mirror/Joint Wills £381 (£31.75 per month)	Advanced Single Will £456 (£38 per month)	Advanced Mirror/Joint Wills £816 (£68 per month)
Married / Civil Partnership, in an established relationship or desire to set up a Will for yourself and another person		✓		✓
The appointment of Executors and Trustees to administer your wishes and control how your assets are distributed	✓	✓	✓	✓
The appointment of Guardians to look after your minor children	✓	✓	✓	✓
The distribution of your assets through the provision of specific (legacy) and residual gifts	✓	✓	✓	✓
The inclusion of simple Trusts for minor children for them to inherit up to the age of 25	✓	✓	✓	✓
The referencing of funeral and organ donation requests	✓	✓	✓	✓
Generic Inheritance Tax advice including gifts to charities and making use of allowances throughout your life time	✓	✓	✓	✓
Straightforward intentions to leave assets unconditionally to named beneficiaries	✓	✓	✓	✓
Protect assets for your children in the event your spouse or partner remarries or updates their Will after your death			✓	✓
Protect vulnerable beneficiaries including those with a disability or a history of substance abuse etc.			✓	✓
Protect assets for your children from previous relationships whilst not disadvantaging your new spouse or partner			✓	✓
Allow someone to remain living in your property or to receive an income for a period of time before passing to other people			✓	✓
Inheritance Tax saving advice for unmarried couples with children who have a high net worth			✓	✓
The ability to change the beneficiaries of your Will through a letter of wishes instead of having to change the Will			✓	✓
Generational Inheritance Tax planning for high net worth individuals			✓	✓

Get in touch with our team:

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