

# Legal Review Programme

Specialist services from the Tax and Estate Planning Department

[whitehead-monckton.co.uk](http://whitehead-monckton.co.uk)







# Introduction



**When you instructed us in relation to your Will and Succession Planning you made an investment of your time and your money.**

Like any investment, it is always good to keep your Will and Succession Planning arrangements under review. In the Legal Review Programme we will take the lead on this by reviewing your affairs on an annual basis, saving you time and energy.

There are a number of elements which may change in the future and which could affect your Succession Planning arrangements.

These can include changes to:

-  Tax law
-  HMRC practice
-  Your financial situation
-  Your health
-  Your beneficiaries' circumstances
-  Your family
-  Your executors' circumstances
-  Your marital status

# Programme Overview



01

The Legal Review Programme is a fixed-fee retainer service where we will review your Will and Succession Planning and proactively contact you at least once a year, with other optional benefits and contact opportunities available.

02

We will review your documents in light of changes in law and practice after which we will contact you with advice. You will then be prompted to consider the impact of changes in your own personal circumstances, your family and financial affairs and can then take the appropriate action if necessary.

03

This annual review ensures that the investment of time and money you have made now remains valid and up to date.

**Disclaimer:** The Legal Review Programme provides members with an annual review and general advice to take additional steps to update your affairs, after having considered your personal circumstances, by amending your Will or other documents, if necessary. It is not a comprehensive review of your circumstances and further advice should always be sought if you are unsure about the impact of any changes in tax law or practice on your affairs.



# Choose the programme to suit you

01

The opportunity to meet face-to-face (or virtually) with your advisor for a meeting of up to 30 minutes on an annual basis to review your succession planning arrangements and discuss any changes.

or

02

An annual behind-the-scenes review of your succession planning arrangements with a letter of advice and recommended next steps.

Plus

- Free amendments to succession planning documentation if changes are minor
- 5% discount on standard fees if more complex amendments to succession planning documentation required
- Priority meeting bookings
- 5% discount on standard fees for your Executors for our Probate and Estate Administration services (up to applying for and issue of the Grant of Representation).



# Enrolment and Terms & Conditions

The Legal Review Programme is a bespoke service, exclusively for our clients Will and Succession Planning. By signing below, you agree to enrol in the Legal Review Programme and to the following:

1. Payments to the firm are annually made by Standing Order
2. Members withdrawing from the Programme are not entitled to any refund if they choose to withdraw from the Programme. Members wishing to withdraw from the Programme are required to give 28 days written notice of their desire to do so. Notice should be sent to Whitehead Monckton at 5 Eclipse Park, Sittingbourne Road, Maidstone, Kent ME14 3EN. On receipt, you will lose all privileges of the Programme
3. Members agree that they will inform the firm of any material change in their circumstances such as their finances, health, marital status, family situation or other matters that may affect the arrangements in place under this firm's Succession Planning services.
4. We retain a continuing right to modify the terms of The Legal Review Programme including the fee, the benefits and enrolment requirements. In the event of such change, member clients will receive written notice of the intended changes 28 days before they are brought into effect.

I/we wish to enrol in The Legal Review Programme in accordance with the above terms for £150 +VAT per annum

Signed

Dated

Print Name

Signed

Dated

Print Name

# Standing Order Mandate

To the Manager

Address

Post Code

Branch sort code

-   -

Bank/Building Society Account number

Instruction to your Bank or Building Society

Please pay to Whitehead Monckton Solicitors a Standing Order from the account detailed in this instruction

Name(s) of Account Holder(s)

Instruction

I/we, [Name]

Please pay the sum of: £180

of, [Address]

ANNUALLY commencing on: DD/MM/YEAR  
until further notice in writing to the following recipient:

Sort code 30-95-37  
Account number 00005763  
Account name Whitehead Monckton

Receiving bank: Lloyds Bank Plc.  
18 Week Street, Maidstone, Kent

Post Code

Signature(s)

Date



With offices in Maidstone, Tenterden and 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.



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