

## Get started with your Essential Package

### Draft documents for **England Wales, Scotland and Northern Ireland**

The **Essential Package** provides you with everything you need for a successful Estate Planning business. You can take client instructions for our extensive range of products & services drafting many documents yourself, all for a low fixed fee of only **£42 + VAT per month**.

You can also input instructions for all documents and send the information electronically to a third party, such as a Central Processing team, Conveyancer or Countrywide to generate for you.

### What's included?



- 1 x Software user licence
- 2 x Desktop Software
- Standard Will - Scotland
- Standard Will - Northern Ireland
- Standard Will - England & Wales
- Deed of Severance (Mutual)
- Deed of Severance (Non - Mutual)

#### Legacies to Trust

*All Trusts cover England & Wales, Scotland and Northern Ireland*

- Life Interest in Property Trust (right to Reside/Life Interest/protective property)
- Nil Rate Band Discretionary Trust
- Residence Nil Rate Band Discretionary Trust
- Discretionary Business Trust
- Discretionary Agricultural Trust
- Discretionary Disabled Trust
- Child Trust

#### Will & Trust Clauses

- Business clause
- Agricultural clause
- Foreign property incl Brussels IV
- Gift of property
- Anticipation of marriage
- Right to occupy
- Monetary legacies within a Discretionary Trust

#### Orders submitted through the Software can include:

- Order Summaries
- Corrections before final documents are produced
- Clients have the option to waive the 14 day cancellation period
- Information saved for submission of second orders

### Brand New Features!

**Create electronic client notes, order notes, to-do task lists and even draw illustrations within the Software.**

**Set up Direct Debits electronically directly from the Software for your clients storage and orders.**

**Preview your legal documents whilst taking instructions.**

**Includes Discretionary Trust that qualifies for the NRB & RNRB.**

For more information please call us on  
**01926 514 392** or email  
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[www.countrywidelegacy.co.uk](http://www.countrywidelegacy.co.uk)

