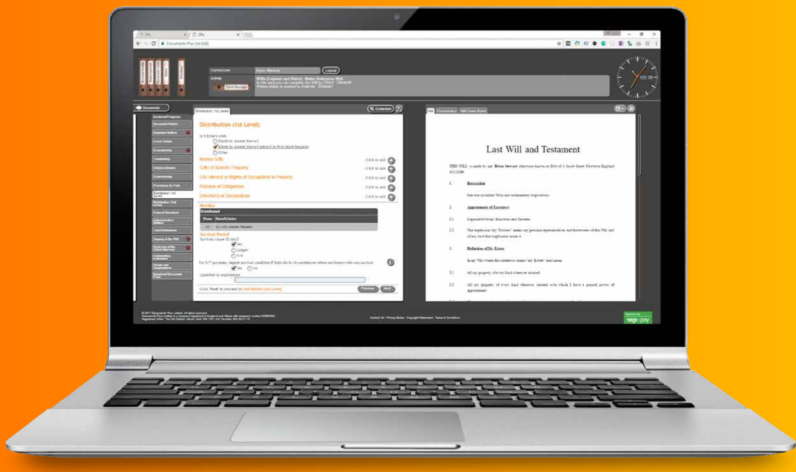
For England and Wales

Everything you need to effortlessly deliver best-practice documents



Data entry

> Automatic re-use of information – relevant details are available across all documentation for a client and their spouse/partner without the need to re-enter.

> Automatic generation of "mirror" Wills and LPAs.

> Intelligent Pick Lists – valid options are only ever shown.

> Enter addresses quickly with Arken's Postcode Engine.

> Database of all major UK charities with addresses and charity numbers included.

> Enter details of potential witnesses and certificate providers for selection and automatic inclusion in documents.

Capabilities

> Intelligent, interactive questionnaire dynamically updates to ensure relevant questions are displayed, reducing the risk something will be missed.

> Interactive Intestacy Guide – simple guide that indicates what happens if someone dies without making a Will.

> Automatic generation of documents.

> Simple to comprehensive Wills created – caters to even the most complex scenarios.

> Guidance and help notes throughout including:

- Inheritance Tax (including Residential NRB)
- EU Succession Election
- Domicile
- Mutual Wills

- Includes Islamic Wills.
- Includes an area to record details of the interview for later reference.
- Custom clause library for Wills – create any additional clauses that can easily be inserted in to Will documents.
- Controlled document editing – all document edits are recorded.
- Customisable document formatting, including font type and size, paragraph numbers, options to sign each page and format of pages.

Client Management

- Create spouse and partner profiles easily.
- View all documents created for client.

Document creation

- The following document types created for England and Wales:
  - Wills
  - Lasting Power of Attorney (Financial)
  - Lasting Power of Attorney (Personal Welfare)
  - General Power of Attorney
  - Severance of Joint Tenancy
  - Expression of Wishes
- Complete client-ready document packs created that can be immediately downloaded to send to clients at the end of the Interview.
- Document commentaries are created for Wills and LPAs and automatically included in a document pack:
  - presented as a helpful personal explanation and overview of the Will that has been prepared for the client
  - explains inter alia the role of executors, guardians and the administrative provisions
  - clearly advises the client upon matters arising within the Will which according to best practice he or she should be made aware of
  - can detail the possibility of any claims against the provisions of the Will
- Completed questionnaires can be downloaded in PDF format as a record of instructions.
- Asset & Liability Record can be downloaded in PDF format for your client.

- Severance of Joint Tenancy pack includes Land Registry Form SEV.
- Document packs include Checking, Draft and Copy – documents watermarked as appropriate.

Will specific

- Full range of specific bequests, including:
    - options to purchase
    - digital assets
- Full range of Trust options including Life Interests, NRB, RNRB, Vulnerable Beneficiary, Discretionary, Business Property Relief, Charitable etc. and Wishes to Trustees.
- Provides for gifts to one person, named persons, groups, charities and Inter Vivos Trusts.
- Provides for gifts to be given in % shares, which, in turn, can be sub-divided into % shares, with controls to ensure no under or over allocation.
- Provides for up to 6 levels of distribution to accommodate the most demanding of situations.
- Provides for up to 99 gifts at any level or class of gifts.
- Record reasons for professional executor/trustee appointment.
- Provides for same or separate Executor and Trustee appointments, including individual alternate appointments and substitute appointments.
- Provides for appointment of separate Business and/or Literary Executors.
- Provides for appointment of specific Trustees for Testamentary Trusts.
- Allows for the appointment of different sets of Guardians.
- Release of Obligations section.
- Includes provision to benefit by the IHT 10% Charity Legacy Relief.
- Includes comprehensive Provisions for Pets.
- Full range of funeral wishes.
- Client capacity – automatic generation of appropriate attestation (e.g. if client cannot read, write, requires translator etc).
- % option to cross-accrue.
- Includes provisions for class closing, age and other conditions.
- Collects and calculates details of assets and liabilities.

> Includes Non-Provision statements.

> Controls throughout the system, for example:

- to ensure that there is not an unintended duplication of money bequests where the testator and spouse/partner make similar Wills
- to ensure no merging of interests in trust situations
- exempt and non-exempt beneficiaries re: Benham
- checks to see if un-transferable nil rate band is of relevance to ensure that the possibility of claiming a further nil rate band exemption is not lost

> Comprehensive Administrative provisions including:

- exclusion of S.33 of Wills Act
- exclusion of S.18A
- Hotchpot
- conversion of estate to cash

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