



**C B E N T R U S T**

**YOUR PERSONALISED WILLS SERVICE**



# CB ENTRUST IS DESIGNED AROUND **YOUR NEEDS**, NOW AND IN THE FUTURE.

CB Entrust is not an off-the shelf will such as those available on the high street, but a fixed price expert approach to writing one of the most significant documents of your life.

As a firm we will demonstrate a holistic understanding of your unique requirements and circumstances. Often our clients don't realise the full complexities of their affairs; CB Entrust will assist you in understanding the intricacies of your life and in ensuring they are documented and managed in the manner you envisage.

As a legal document, any small error in the wording of a will is open to interpretation and in extreme circumstances can render the will invalid. An in-depth consultation with a specialist lawyer as opposed to completing a DIY will form will give you peace of mind knowing that you have had expert advice on inheritance and taxation planning. This advice will also enable you to establish clearly your potential Inheritance Tax liability.

## **WHAT ARE THE RISKS OF NOT HAVING A WILL?**

If an individual dies without a will they are referred to as dying intestate, meaning that the devolution of their estate is governed by law. This may result in all or part of their estate passing into the wrong hands (e.g. an estranged family member) or possibly to the Crown. There may also be adverse tax consequences.

## **WHAT ARE THE RISKS OF HAVING AN OUT-OF-DATE WILL?**

The wishes of the individual may no longer be accurate if the will was made some time ago. It is advisable to regularly review wills to ensure tax efficiency and to reflect the individual's personal circumstances. CB Entrust includes a 5 year health check to accommodate the inevitable changes in your life.



## WHAT OUR WILLS PACKAGE INCLUDES:

- Initial consultation/life audit to give us knowledge of your affairs from the outset
- Flexibility to provide your consultation at your office, a similar London location, or virtually
- A designated lawyer to be your ongoing point of contact as part of our complimentary advisory service to gauge when changes need to be made to your will
- Comprehensive drafting of your will
- Secure storage of your will
- 5 year health check of your will
- Access to a network of expert lawyers who can advise on different areas of law as demanded
- The commitment of a leading private client law firm whose support will grow with you and your wealth

## HOW MUCH WILL IT COST?

We charge £2,000 (plus VAT) for a single will and £2,500 (plus VAT) for two mirror wills (e.g. for a married couple). Wills with more complex demands (i.e. those involving trust structures) may be subject to higher fees which will be made clear early on in the wills consultation.

For further information contact

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