

WILLS & LASTING POWER OF ATTORNEYS (LPAs)

Putting a Will in place ensures that following your death, your estate is dealt with in accordance with your wishes. With effective planning, a Will also make sure your loved ones are provided for in a tax-efficient way.

We appreciate that each client is different and therefore offer a bespoke and personalised Will writing service based on your own specific circumstances and requirements.

Our in-house team of experts in trusts, estate planning and tax will help you write a Will to:-

- Minimise any inheritance tax liabilities
- Ensure your assets go to the people you want
- Appoint legal guardians for any children who are still minors
- Name trusted people as executors to manage your affairs when you die
- Reflect changes in your life circumstances, such as marriage or divorce, or the birth of children or grandchildren
- Set up trusts and make gifts to charity
- Ensure you have the right structure to maximise tax efficiency

We regularly deal with complex and high-value estates, often with international assets, and we understand the unique challenges this can present.

Our Will writing service includes a meeting to take your instructions at a location that is convenient to you, whether our offices, your home or your place of business. Once drafted and agreed we will also manage the signing/witnessing of your Will and can offer free advice to your Executors/ Trustees. Secure storage can also be arranged, if required.

For those who have a Will in place we are also able to offer a review to ensure details are current and up-to-date and reflect legislation changes.

Through our service, our advisors can also assist with drafting a Lasting Power of Attorney , this document lets you appoint one or more people you trust to make decisions on your behalf should you lose mental capacity whether through an accident or illness. We can assist with both types of LPAs; Property & Financial Affairs and Health & Welfare.

To arrange your complimentary 30 minute consultation to discover how our services may benefit you, please contact: theprivateoffice@sopherco.com.

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