

A GUIDE TO ....

# OUR PRICES

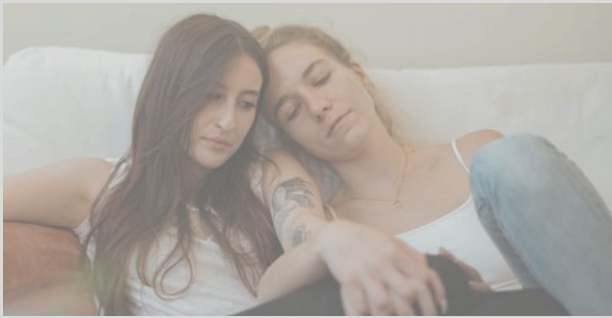
Morecambe Bay Wills and Estates



July 2024

## AFFORDABLE, VISIBLE, CHARITABLE

- Our service is very affordable as we believe finance shouldn't stop you being protected.
- Our services are personal, with a home visit if you would like one.
- We don't hide behind "FROM" prices. We show our prices so you can see what you will pay, inclusive of VAT.
- Updates to your Will are discounted when you store your documents with us.
- We offer discounts for those on low incomes or facing serious illness, and we also offer flexible payment options to help spread the cost.
- 5% from every invoice is donated to local charities with more than £25,000 raised so far.



## STANDARD WILLS

A single Will is £195.

A pair of Wills for a couple is £350.

Updates to Wills are FREE when you store your documents with us, or cost £100 per Will otherwise.

## PROPERTY TRUST WILLS

Adding a property trust clause to your Will to protect your share of your home needs additional paperwork, and in some cases, a "tenancy severance". A single Property Trust Will is £350 and for a couple it is £600.



## TRUST WILLS

If you'd like to protect vulnerable beneficiaries or maybe ensure your inheritance stays in your family, then you can include a Discretionary or Life Interest Trust in your Will. A single Trust Will is £450 and for a couple it is £675



01524 571032

[info@morecambebaywills.co.uk](mailto:info@morecambebaywills.co.uk)

[www.morecambebaywills.co.uk](http://www.morecambebaywills.co.uk)

## LASTING POWERS OF ATTORNEY

There are two types – Property & Financial and Health & Welfare. We recommend making both types at the same time.

Our service includes preparing your forms and making sure they meet the complex signing procedures. We then submit them to the Office of the Public Guardian and monitor them through their process, keeping you informed all the way. When they are registered, we return the originals plus a copy for you to certify. We can also arrange for them to be stored securely along with your other documents.



## OUR AFFORDABLE CHARGES

Finance OR Health LPA

Single £300      Couple £450

Finance AND Health LPAs

Single £450      Couple £750

The cost is spread over 3-6 months depending on your needs

In addition to our charges, a Registration Fee of £82 per LPA is required by the Office of the Public Guardian. There are some exemptions and reductions for those who receive means-tested benefits or have a low income. We will help you to see if these could be applied.

## BUSINESS PROTECTION

You can protect your family business from potential future Inheritance Tax issues, or accidental disinheritance, with a Business Property Relief Trust, which adds £300 to your Will.

You should also protect your business finances from being frozen if you were unable to act, by preparing a Business LPA. These cost £300-£500 depending on the size and complexity of your business



 **MORECAMBE BAY  
WILLS & ESTATES**

  
LANCASTER WILLS

  
NORTH WALES WILLS

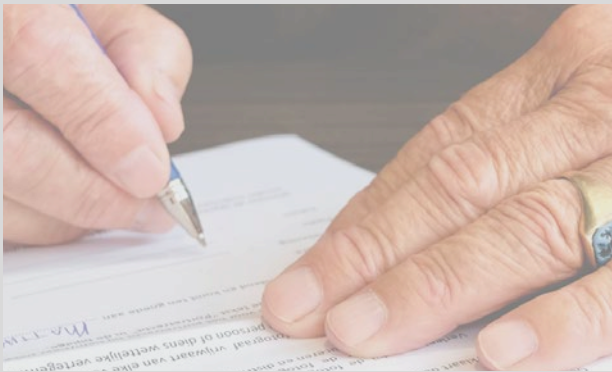
  
KENDAL WILLS

# STORING DOCUMENTS

Storing all your important documents with our independent Archive partner costs £25 p.a.

You can store as many documents as you like or add more documents for free. You can get copies, or retrieve documents, for a small postage charge.

All our Wills are registered for you FREE on the National Will Register wherever you decide to store your Will. And you get a 25% discount if you need to update your Will in the future.



# EXECUTOR ASSISTANCE

If you've lost a loved one and need some help in dealing with all the paperwork, then we offer two types of assistance:

For our simple info gathering/reports OR our Probate forms assistance service, we charge £595. If you need both of these services our charge is £895 for simple estates, more for complex estates.. (Probate/Disbursement fees are extra)

# HELP FOR YOU AND OTHERS

As part of our charitable aims, we want to make sure finance is NOT a barrier to you and your family being protected. If you are on a low income, receive means tested benefits, or are facing a serious illness, ask us about our discounts.

If you've already used our services, and would like to help others, ask us about our "pay it forward" option. This could help someone else get that same peace of mind, you now have.



## WHEN DO I PAY?

We believe in making sure that finance isn't a barrier to making sure you and your family are protected. So we want to make it as easy for you as we can.

We don't ask for payment up front but we do ask you to pay promptly as soon as we have completed our work for you. The only exception is LPA Fees which we take as we submit the application for you.



## HOW DO I PAY?

The easiest way to pay is by Bank Transfer, although we do accept cheques and cash if you prefer.

Our invoices provide all the detail you need to pay us.

## RELAXED PAYMENTS

If you prefer you can ask us to invoice you on a monthly basis to help you budget and spread the costs.

For Wills or Powers of Attorney, this can be 3 equal payments.

If you are making Wills AND Lasting Powers of Attorney with us, you can make 6 equal payments if you prefer.



Please note this is NOT a credit agreement. We are simply agreeing to invoice you on a monthly basis as we complete our work for you.

**MW** MORECAMBE BAY  
WILLS & ESTATES



LANCASTER WILLS

NORTH WALES WILLS

KENDAL WILLS