



## **PRESS RELEASE - 1<sup>ST</sup> FEBRUARY 2024**

### **"Morecambe Bay Wills and Estates Grows Its Customer-Focused Services with Strategic Acquisition of Kendal Wills and Lancaster Wills"**

In the bustling landscape of estate planning, one local independent firm in North West England is carving out a niche for themselves. Morecambe Bay Wills and Estates recently broadened their horizons with the acquisition of Kendal Wills Limited and Lancaster Wills. The purchase, finalised on January 31, 2024, heralds an exciting new era for the company. This expansion comes in response to the retirement of Paul Rodman from Kendal Wills Limited, with Kendal Wills and Lancaster Wills joining the Morecambe Bay Wills and Estates family.

Nicola, the founder of Morecambe Bay Wills, set out with a vision to offer a service that was not just professional and cost-effective but also deeply personalised. "We're dedicated to providing affordable peace of mind with a charitable focus," Nicola shared during our interview. "Our clients appreciate our approach, which puts their needs at the forefront. This expansion allows us to help more people from our local communities – something the whole team are passionate about."

Morecambe Bay Wills and Estates Ltd, a local independent company based in Lancaster, Lancashire, has been making significant strides in the estate planning industry since its inception on 1 March 2019. The brainchild of Nicola Combe, who retrained to set up the firm, Morecambe Bay Wills provides services including Wills, Trusts, Lasting Powers of Attorney, and Executor services. The firm has been recognised nationally for its superb service at the British Wills and Probate Awards, as "Will Writing Firm of the Year" and "Customer Service Champions". Nicola has also bagged the prestigious "One to Watch" and "Sole Practitioner of the Year" awards. Today, the company continues to offer personal, cost-effective solutions to its clients, solidifying its reputation as a trusted local name in the field of estate planning.

This commitment to customer service has earned the firm glowing feedback from clients. One such client, John, praised the firm's professionalism and attention to detail. He said, "The team at Morecambe Bay Wills and Estates were thorough and considerate. They made the complex process of estate planning much more manageable."

With the company's recent growth, including plans to move into larger offices later this year, and further increase the size of the team, Nicola insists that their core values will remain the same. "We're thrilled about our future, but our main focus will always be our clients," she affirmed. "Ensuring a smooth transition for all customers who have now come under our care will be our focus, and we are looking forward to helping both existing and new clients with all their needs".

To facilitate a smooth handover for the clients of Kendal Wills and Lancaster Wills, Morecambe Bay Wills is organising "Meet the Team" events. These gatherings provide an opportunity for clients to meet the estate planners and ask questions in an informal setting. These sessions are also open to anyone who would like to have a no-obligation chat about their estate planning, and people can book free of charge via EventBrite.

The team at Morecambe Bay Wills is fully trained and insured, offering a high level of professional service, and are members of the Society of Will Writers. They are also committed to local charity, having raised in excess of £20,000 for Cancer Care and other local charities.

As Morecambe Bay Wills embarks on this exciting new journey, it continues to demonstrate that a personal touch can make a world of difference in the sometimes complex realm of estate planning.

For more information about Morecambe Bay Wills services and the team, visit their website at [www.morecambabaywills.co.uk](http://www.morecambabaywills.co.uk), call them on 01524 571032 or send an email to [info@morecambabaywills.co.uk](mailto:info@morecambabaywills.co.uk).