

# WE LIKE TO HELP ESTATE PLANNING

**Estate planning is an important and vital part of financial planning and in order to be able to provide comprehensive advice and help those that you leave behind at the time of need please provide copies of any existing Wills, Trusts, Lasting Powers of Attorney, or Funeral plans.**

It is vital that your documents are stored in a secure location where they can be retrieved at the time of need. If you have existing documents, please provide full details of their storage location. Experience over many years has shown that we are one of the first places that your executors or beneficiaries will come for information and they will ask us where the documents are located.

## Personal Finance Portal (PFP)

At the relevant time your [Personal Finance Portal \(PFP\)](#) account becomes your 'Legacy Account' where we are able to provide information to your Executors on receipt of your death certificate.

## Wills, Trusts & LPAs

If you do not have these in place or you wish to revise your existing documents, it is important that you give them your attention. In order to proceed complete the [Will data gathering form](#) to obtain details of Executors, Guardians, Trustees, Attorneys, Beneficiaries from the link below.

We have been providing this service to clients for over twenty years and Alan Moran is a Fellow of The Society of Will Writers and an Affiliate of STEP. We are work in association with Countrywide Tax & Trusts and we use their guidance and assistance.

## Funeral Planning

[Funeral Planning](#) is an essential element of this planning and we can advise you regarding suitable funeral planning arrangements. We have devised our [Funeral Wishes form](#) to ensure that those that you leave behind are aware of your wishes and requirements.

## Links to Further information and Resources

- [Our Estate Planning Services & Fee Schedule](#)
- [Our Specialist Estate Planning Website](#)
- [Estate Planning Guides: Wills, Trusts, LPAs & Care Home Considerations](#)
- [Guides to Wills, LPAs, Property Ownership Guardians etc](#)
- [Financial Guides on Long Term Care, Wealth Protection & Inheritance Tax](#)
- [Videos on Estate Planning & Later Life Planning](#)
- [Wills, Trusts & LPAs Information Gathering Form](#)
- [Funeral Planning & Funeral Wishes Form](#)