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Your guide to

Wills, Trusts, Probate and Retirement Planning



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“ As much as we would like to, and as much as we might try, there are many things in life that we have little or no control over.

It doesn't matter how old we are, some events in life can have an enormous impact on our own lives and those of our families.

If we knew in advance when they were going to happen then we would certainly want to plan ahead even if we couldn't avoid them. ”

The Woodfines Wills & Estates team is dedicated to helping you and your family plan for some of the major events in life:

- making a will
- enabling someone to look after your property and affairs
- choosing someone to make welfare and medical decisions for you
- funding your retirement
- dealing with the affairs of a loved one who has died
- providing for your family's financial security.

Thinking and planning ahead gives you peace of mind that, whatever the future holds, you have taken the necessary steps to make sure that those you trust will look after you and your affairs in the best way possible. It won't change the future but it will change how the future affects you and your family.

Here are some of the areas in which our team at Woodfines can help you...

Wills and the Administration of Estates

It is tempting to put off making a will until later. There are usually more attractive things to think about! The trouble is that a large percentage of people never get round to it at all. If you were one of those then this could cause problems for your family after your death. You may be surprised at how events would turn out where there is no will. You may find that those who you don't want to receive your money end up being the ones who benefit the most.

A will is likely to be one of the most personal documents you will ever make. Everybody's circumstances are unique and so we tailor-make your will to fit your individual wishes. Our priority is to listen to you and to handle what you tell us with care and sensitivity. That way you can be sure that your will puts into effect what you want to achieve.

When, eventually, the time comes for the will to be carried out our team can guide those you have chosen to act upon your wishes through the many steps which will need to be followed. This can be an emotional time but you can be certain that our many years of experience will enable the task to be completed smoothly and efficiently.

Trusts and Tax

Trusts are often seen as the preserve of the few. In actual fact you may be closer to a trust than you realise. For instance, if you own a house jointly with someone else then you have a trust.

More often than not trusts are set up either to protect property for the benefit of someone or to protect it from the clutches of others, or even both. Trusts can play a very important role in wills and also in relation to property over which special arrangements need to be put in place.

Our team has a wealth of experience in preparing and advising on trusts for generations of families. Our help and advice has proved invaluable to families who wish to safeguard different types of property.

When it comes to tax, it is a subject you are likely to be all too familiar with! Yet putting in place steps to reduce your tax burden may seem a daunting task.

We can advise you on the best way to plan ahead and to arrange your tax affairs in your lifetime to reduce the amount of tax eventually payable. We often work closely with your accountant or financial adviser to achieve the best possible result.

Retirement Planning Services

It is an undisputed fact that, as a society, we are living longer. Many not only see their children grow up, but also their grandchildren and great-grandchildren. However, increasing age brings with it a greater chance of dementia and frailty in older years. If this happens to you then it will make managing your own affairs extremely difficult.

Our dedicated team has the expertise and experience to advise you on preparing for the time when you may not be able to manage your affairs yourself. These circumstances can be distressing for both you and your family and many people have benefited from asking us to help them carefully plan for such times.

When we talk to people about the benefits of a power of attorney over their affairs or the need to plan for long term residential care, they recognise that we offer them up to date practical solutions to their or their family's needs and problems. They are then keen to recommend us to their families, friends and business colleagues.

Woodfines can help you with:

- W* Wills
- W* Estate Administration
- W* Trusts
- W* Tax and Estate Planning
- W* Powers of Attorney
- W* Court of Protection matters
- W* Equity Release
- W* Contested Wills
- W* Care Fees
- W* Living Wills

Getting in touch

People often turn to us when it is too late. If you have any questions which are concerning you, please don't hesitate to contact us. It is far better to talk through the matter with us now and to allow us to offer you some practical guidance to avoid expensive and distressing problems later on.

Call us and let us help you.

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