
When you write a Will you must appoint an Executor and Trustee to handle your affairs when you die. Most people think that this is an easy task but it can be extremely complex and, of course, it all happens at the time of greatest grief.

We know only too well the problems that can arise and that is why, by appointing Affinity Wills to be your Executor and Trustee, you can rest safe in the knowledge that administration of your estate will be dealt with by experts in a professional, efficient and caring manner.

Affinity Wills (regulated by the society of Will Writers) is an independent company that will also offer impartial professional help on such matters as:-

- Setting up Lasting Powers of Attorney
- Setting up Trusts
- Handling investments*
- Handling Intestacy (when someone dies without leaving a valid Will or has no Will)
- Transfer of Property, Shares and Investments etc.

Affinity Wills can offer services ranging from purchasing property or businesses, to giving independent and impartial advice on the whole range of financial services and products available in the marketplace today* – in exactly the same way as a high street bank does through its own Trust Corporation.

However Affinity Wills does differ in the rates that it charges – they are lower than both solicitors and banks.

* Financial advice and services are provided by Affinity's associated financial advisers.

An Executor or Trustee, whether a lay-person or a professional is legally responsible in law for:

- Ensuring that the death is registered
- Organising the funeral
- Ascertaining the interests, values and liabilities of the deceased
- Investigating all outstanding aspects of the estate
- Complying with the legal and fiscal requirements and completing the various forms for the Probate Registry and the Inland Revenue
- Determining all tax liabilities
- Negotiating valuations of all assets including property, shares, business interests etc.
- Payment of all outstanding bills and any debts, including Inheritance Tax
- Administering assets - sale or transfer of property, shares, Bank and Building Society Accounts
- If necessary arranging the running of a business until disposal
- Distribution of the estate as directed by the Will
- Preparation of accounts

In addition to those listed above, there may be many other tasks or unforeseen problems, which will have to be carried out or dealt with before your beneficiaries can receive any funds from your estate - these delays can cause financial hardship.

Affinity Wills Ltd

Affinity Wills can remove all these problems and handle the estate promptly and for a known fixed fee.

- If you have already written a Will but decide to appoint Affinity Wills, please talk to your consultant for the necessary information on how we can change your Will for you.
- If you have not written your Will, please contact us for help and guidance through our 'home visit' Will Writing service offered by your local Society member - Affinity Wills Ltd.
- If you appoint Affinity Wills to act as your Executors and Trustees Affinity Wills will store your Wills in their Will bank for a small annual fee.
- If you find yourself in a position either where someone has appointed you to be their Executor, left a Will where there is no Executor to act, or if you have lost a loved one who has not left a Will, Affinity Wills can take the worry and burden from your shoulders and deal with the estate on your behalf – help is only a 'phone call away.

Produced and published by:

Affinity Wills Ltd

Regulated by the Society of Will Writers

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Looking after your family

Appointing



A F F I N I T Y
L e g a l G r o u p

Executorships and Administration Services

Trusts and Powers of Attorney

A Public Information Leaflet