

**wills**  
at **work**



Untangling wills and LPAs for employees

**We introduced a Wills at Work scheme 6 years ago and have been delighted with the service provided. It has proved to be a popular benefit for employees.**

Ecclesiastical Insurance



## **It doesn't have to be complicated**

Nobody likes to imagine how life events could affect their ability to manage their affairs day to day, let alone the future without a loved one.

It's scary to think about and even harder to talk about. With so many companies offering so many different options, it's no wonder that people routinely put off making a will and Lasting Powers of Attorney. That's why we've developed Wills at Work, a dedicated will and LPA drafting service for employees that's tailored to your company's existing benefits package.



## A modern company with a modern solution

We know that each benefit scheme is unique, so we tailor Wills at Work to meet your requirements. We train HR professionals to promote the offering and provide them with whatever marketing materials they need, from printed resources like leaflets and posters to digital materials, including podcasts and webinars. We also provide educational opportunities for staff at benefit fairs and events, or at the office with breakout sessions and lunchtime drop-ins.

If an employee chooses Wills at Work as part of their benefit package, there's no hard sell, and we don't visit their home or sign them up to packages they don't need. Once an employee chooses Wills at Work, we get in touch with them via email, telephone or video conference to complete their will and / or LPA to their satisfaction.



### Unique Service

Our service is simple and easy to use. Once an employee chooses Wills at Work, we liaise with them directly to complete their will and / or LPA.



### Training

We can provide training on our Wills at Work service to HR professionals so that they are confident in talking about the service with employees.



### Marketing Materials

We produce all the marketing materials you'll need, from printed resources for the workplace to digital materials that can be viewed at anytime, anywhere.



### Educational Opportunities

From roadshows and benefit fairs to breakout sessions and lunchtime drop-ins, our team are on hand to complement your financial wellbeing programme.

## Keeping it simple

Wills at Work is easy to use for everyone. If an employee chooses Wills at Work as a benefit, we deal with them directly to ensure a personal and confidential service.

### For employers

We help HR teams to maximise employee engagement at every turn, allowing you to emphasise the financial wellbeing culture of your company, minimise distress in the event of a death, and expand your excellent benefits provision with additional important legal services.

An agreed fee is charged per employee that takes up the scheme, with no hidden fees or additional charges. This can be incorporated into any existing benefit scheme or platform.

### For employees

Depending on an employee's individual circumstance, we offer a Basic or Plus service in connection with the drafting of your wills. An employee may need our Plus service if they have more complex arrangements, such as owning assets outside of England or Wales, or if they have children from a previous relationship.

We also offer services in connection with the drafting of both Health and Welfare and Property and Financial LPAs.

When someone takes up the scheme, we provide them with:

- ✓ An interactive online questionnaire and dedicated email address
- ✓ Draft wills and / or LPAs prepared by a qualified solicitor
- ✓ A 20-minute telephone call or video conference
- ✓ Free storage of completed wills and registered LPAs and other important documents
- ✓ Advice about death in service and/or life assurance benefits, where applicable
- ✓ An automatic reminder to review or update a will and LPAs in five years' time

If an employee chooses our Plus service in connection with the drafting of their will, we also provide a review of their inheritance tax position and a longer consultation. Watch our video for employees [HERE](#).



## A professional and trusted partner

Wills at Work has been developed and is provided by Harrison Clark Rickerbys, a top 60 law firm. The firm was founded in 1796, and has been providing exceptional legal services and outstanding care to clients ever since.

Our job is people – we get to know what’s important to our clients, helping them to protect their family and their loved ones in the event of their death.

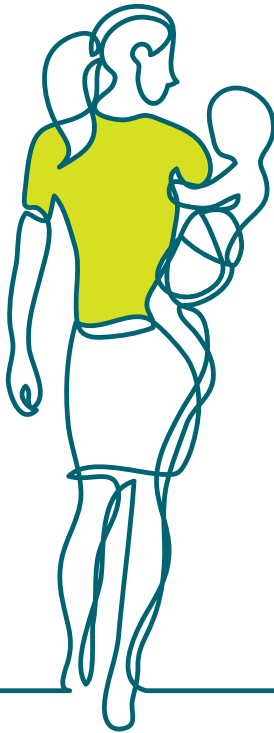
We offer a complete package, designed to your specifications and delivered by qualified solicitors. Our Wills at Work team, led by partner David King, works closely with HR departments to provide them with the support they need, and offer security and confidentiality to your employees.



**Wills at Work has provided our clients and our own staff with the opportunity to easily access a high quality will with a highly regarded firm of solicitors. It has taken away the issue of continually putting off making a will as you no longer need to find a reputable firm yourself and the whole process is easy and as streamlined as possible. The service is extremely professional and high quality as you would expect from a top firm of solicitors. I can give no greater compliment than to say I used the service myself and was extremely happy with the whole experience.**

Gary Wilson, Benefits Management Consultant, Jelf | Employee Benefits





## Take the next step

Figures suggest that over 60% of the UK population have not made a will and 78% of people have not made LPAs. Our service helps you to encourage staff to take responsibility, and provides peace of mind for both employers and employees should the worst happen.

If you are interested in adding Wills at Work to your existing benefits offering, please call us today for a no-obligation discussion.

### David King

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Wills at Work is a trading name of Harrison Clark Rickerbys Ltd, which is authorised and regulated by the SRA.

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We invest in people Standard

**Lexcel**  
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