

# Document Drafting List



**This document outlines:**



**Which Software Package you require to draft each of the stated legal documents, products or services.**

**Once a Software Package has been purchased, no further fees are payable.**

Consultants either on the road taking instructions or taking instructions over the phone, can complete the Software file. The file can then be submitted to the central document processing team for quick and easy processing, thus reducing costs. Alternatively, the file can be forwarded to a third party for processing if needed. All of which means taking instructions on paper is not required.

## Coming Soon

**Marketing Package within our CRM System:** Our Essential Package already includes a CRM system free of charge, and we are currently developing a Marketing Package where you will be able to send email campaigns, newsletters, marketing letters and much more.

## Document Drafting List

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| <ul style="list-style-type: none"> <li>S1. STEP compliance fee</li> <li>S2. P.A service</li> <li>S3. Wills</li> <li>S4. Trusts available within the 'Standard Will'</li> <li>S5. Additional services</li> <li>S6. Pilot Trusts settled by a Will</li> <li>S7. Pilot Trusts NOT settled by a Will &amp; associated documents</li> <li>S8a. Probate Preservation Plus Trust</li> <li>S8b. Probate Trust</li> <li>S8c. Gift Trusts</li> <li>S8d. Holdover Gift Trusts</li> <li>S9. Life Assurance Trusts</li> <li>S10. External Life Assurance Trusts</li> <li>S11. England &amp; Wales</li> </ul> | <ul style="list-style-type: none"> <li>S12. Northern Ireland</li> <li>S13. Scotland</li> <li>S14. Property services &amp; Conveyancing</li> <li>S15. Deed of Variation and related products</li> <li>S16. Cross Option Agreements</li> <li>S17. Reports</li> <li>S18. Services to assist clients at the point entering care</li> <li>S19. Dealing with local authorities in correspondence relating to care funding issues</li> <li>S20. Nuptial Agreements</li> <li>S21. Probate Forms</li> <li>S22. Trust Administration</li> <li>S23. Other products</li> <li>S24. Funeral Plans</li> </ul> |
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## Generate with our Software Packages

You are able to generate these products or documents at no extra cost with certain Software Packages. Simply purchase the Package and draft at no extra cost. The Essential Package is the initial Package you will need to purchase.

### Key

-  **Professional Bundle**  
You are able to generate these products or documents with our Professional Bundle.
-  **Essential Package**  
You are able to generate these products or documents with our Essential Package.
-  **Pension Package**  
You are able to generate these products or documents with our Pension Package.
-  **Investment Package**  
You are able to generate these products or documents with our Investment Package.
-  **Life Assurance Package**  
You are able to generate these products or documents with our Life Assurance Package.
-  **England & Wales LPA Package**  
You are able to generate these products or documents with our LPA Package.
-  **Scottish POA Package**  
You are able to generate these products or documents with our POA Package.
-  **Northern Ireland EPA Package**  
You are able to generate these products or documents with our EPA Package.
-  **Will Clarity Package**  
You are able to generate these products or documents with our Will Clarity Software Package.
-  **Price on Application**  
You are able to generate these products or documents with our Software, but price is on application.
-  **Coming Soon**  
Soon available to generate at no extra cost with our Software Packages.
-  **Countrywide Products/Services**  
Products and service that Countrywide Tax and Trust Corporation Ltd offers.

\* Generate an unlimited amount of these documents under your monthly Software subscription fee.

\* Please note the document drafting list does not correspond to the processing price list.

## S1. STEP Compliance Fee

Identifies which Package drafts the listed document

STEP Compliance Fee	Countrywide Products/Services
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## S2. P.A Service

Data Input Service (single client / joint)	Countrywide Products/Services
P.A Service (single client / joint)	
P.A Plus Service (single client / joint)	

## S3. Wills

Standard Will	Essential Package	Pro Bundle
Will with Distribution to Pilot Trust(s)	Price on Application	

### Risk Statements to be included with the Will

Will Clarity Statement	Will Clarity Package
Execution Statement	

### Additional Clauses options to be included in the Will

Agricultural Clause within the Will	Essential Package	Pro Bundle
Business Clause within the Will		
Foreign Property - Including Brussels IV		
In Anticipation of Marriage Clause		
Gift of Property Clause within the Will		
10% Charity Clause within the Will		

## S4. Trusts available within the 'Standard Will'

Items with a + are available to draft using the Multiple Sibling Trust Package

Standard Will	Essential Package	Pro Bundle
Nil Rate Band Discretionary Trust within the Will +		
Children's Trust within the Will		
Disabled Discretionary Trust within the Will +		
Life Interest in Property Trust <sup>+</sup> (Right to Reside/Life Interest/Protective Property Trust)		
Agricultural Trust within the Will		
Business Trust within the Will		
NRB & RNRB Discretionary Trust within the Will		
Discretionary Trust of Residue (Inc RNRB) within the Will		
Discretionary Trust of Residue		
Interest in Possession Trust of Residue		

## S5. Additional Services

Identifies which Package drafts the listed document

Document Checking Service (per client)	<b>Countrywide Products/Services</b>
Document Storage Service (per household)	
Urgent Service (per order)	
Reprint of documents (per document)	

## S6. Pilot Trusts settled by a Will

Family Trust	<b>Price on Application</b>
Flexible Family Trust	
Family Interest in Possession Trust	
Family Business Trust	
• Business Clause within the Will	
Family Agricultural Trust	
• Agricultural Clause within the Will	
PPPT (Trust only)	

## S7. Pilot Trusts NOT settled by a Will & Associated Documents

Family Probate Preservation Plus Trust	<b>Price on Application</b>
Family Gift Trust	
• Declaration of Trust (other assets - historical)	
• Declaration of Trust (other assets)	
Family Disabled Trust	<b>Pension Package</b>
Family Holdover Gift Trust (CGT Holdover)	
Family Personal Injury Trust	
Family Pension Death Benefits Trust	<b>Investment Package</b>
• Nomination of Pension Death Benefits	
Family Investment Probate Trust	<b>Price on Application</b>
• Deed of Assignment (Investment Bond)	
• Investment Trust Bank Account	
Family Life Assurance Trust	<b>Price on Application</b>
• Deed of Assignment (Life Assurance)	

## Packages

Identifies which Package drafts the listed document

### S8a. Probate Preservation Plus Trust - For the principle private residence

#### Family Probate Preservation Plus Trust (PPPT) or (PPPTOL) with money back guarantee

- Conveyance
- Money Back Guarantee

Per Extra Family Probate Preservation Plus Trust (PPPT)

Per Extra Conveyance

#### Family Probate Preservation Plus Trust (PPPT) or (PPPTOL) without money back guarantee

- Conveyance

Per Extra Family Probate Preservation Plus Trust

Per Extra Conveyance

**Price on Application**

### S8b. Probate Trust - Trust for properties and Assets other than principle private residence

#### Family Additional Property Probate Trust (Second property only)

- Conveyance

Per Extra additional Family Probate Trust (Second property only) *to include an additional Declaration of Trust*

Per Extra Conveyance

#### Family Investment Property Trust (Bond)

- Deed of Assignment (Investment Bond)

Per Extra Family Investment Probate Trust

Per Extra Deed of Assignment (Investment Bond)

**Price on Application**

### S8c. Gift Trusts - Trusts to start the 7 year clock

#### Family Gift Trust (Property only)

- Conveyance

Per Extra Family Gift Trust (Property only) *to include Declaration of Trust*

Per Extra Conveyance

**Price on Application**

**Identifies which Package  
drafts the listed document**

<b>Family Gift Trust (Bank Account only)</b>	<b>Price on Application</b>
• Trust Bank Account	
Per Extra Family Gift Trust (Bank Account only) to include Trust Bank Account	
<b>Family Gift Trust (Investment other than Bond)</b>	
• Transfer Forms	
Per Extra Family Gift Trust (Investment other than Bond) to include extra transfer funds	
<b>Family Gift Trust (Bond only)</b>	
• Deed of Assignment (Bond)	
Per Extra Family Gift Trust (Bond) to include additional assignment	
Per Extra Deed of Assignment (Investment Bond)	

**S8d. Holdover Gift Trusts - Trust when CGT can be held over**

<b>Family Holdover Gift Trust (Property only)</b>	<b>Price on Application</b>
• Conveyance	
• CGT Deferral Form	
Per Extra Family Gift Trust (Property) to include Declaration of Trust	
Per Extra Conveyance	
<b>Family Holdover Gift Trust (Investment &amp; Shares)</b>	
• CGT Deferral Form	
Per Extra Family Holdover Gift Trust (Investment & Shares) to include extra transfer documents	

**S9. Life Assurance Trusts**

Family Life Assurance Trust	<b>Life Assurance Package</b>
• Deed of Assignment (Life Assurance)	
Family Joint Life Assurance Trust	<b>Coming Soon</b>
Declaration of Trust (Large Life Policy)	<b>Price on Application</b>
Deed of Assignment (Large Life Policy)	
Large Life Policy Disclaimer	



## S10. External Life Assurance Trusts

Identifies which Package drafts the listed document

Life Assurance Trust Analysis ET (Summary)
Life Assurance Trust Analysis ET (Full Client Report)

Countrywide Products/Services

## Lasting Powers of Attorney & Deputyship

### S11. England & Wales

LPA - Health & Welfare incl Registration documents
LPA - Property & Financial incl Registration documents
General Power of Attorney
Advanced Decision
LPA - Registration (External drafted documents)
LPA - Deed of Revocation
Court of Protection Deputyship Application
EPA - Registration (External drafted documents)
<b>Business Lasting Powers of Attorney (England &amp; Wales)</b>
LPA - Business incl Registration documents
Review of Partnership Agreement
Review of Articles of Association for Ltd Co.

LPA Package  
(England & Wales)

Pro Bundle

Coming Soon

Countrywide Products/Services

### S12. Northern Ireland

Enduring Power of Attorney (Northern Ireland)
EPA - Registration (External drafted documents)
General Power of Attorney
EPA - Deed of Revocation
<b>Business Enduring Powers of Attorney (Northern Ireland)</b>
EPA - Business incl Registration documents
Review of Partnership Agreement
Review of Articles of Association for Ltd Co.

EPA Package  
(Northern Ireland)

Pro Bundle

Coming Soon

Countrywide Products/Services

## S13. Scotland

Identifies which Package drafts the listed document

POA - Continuing Financial incl Registration documents	<b>POA Package (Scotland)</b>
POA - Welfare incl Registration documents	
POA - Joint Continuing Financial & Welfare incl Registration	
POA - Registration (External drafted documents)	
General Power of Attorney	
<b>Business Powers of Attorney (Scotland)</b>	<b>Coming Soon</b>
POA - Business incl Registration documents	<b>Countrywide Products/Services</b>
Review of Partnership Agreement	
Review of Articles of Association for Ltd Co.	

## Property & Conveyance

### S14. Property Services & Conveyancing

Conveyance - England & Wales	<b>Price on Application</b>	
Conveyance - Northern Ireland		
Conveyance - Scotland		
Severance of Tenancy (Mutual)	<b>Essential Package</b>	<b>Pro Bundle</b>
Severance of Tenancy (Non Mutual)	<b>Price on Application</b>	
Trust of Land (Historical)		
Conveyance Document Drafting Package		
• Form FR1		
• Form DL		
• Overriding Interest Form		
• Declaration of Trust		
• RX1		
• TR1		
• Assent if required		
House Purchase CW Acting	<b>Price on Application</b>	
House Sale CW Acting		
Land Registry Search		



## S15. Deed of Variation and Related Products

Identifies which Package drafts the listed document

Deed of Variation	<b>Price on Application</b>
Family Trust (DOV)	
Family IIP Trust (DOV)	
Trust Bank Account	
Loan Document (Trust to Individual)	
Deed of Assignment (Investment Bond)	

## S16. Business Agreements

Cross Option Agreement	<b>Price on Application</b>
Deed of Assignment (Life - Shareholders Trust)	
Shareholder Trust	
Shareholder Agreement	
Partnership Agreement	

## S17. Reports

Offshore Report	<b>Coming Soon</b>
Onshore Report	
Instruction 102(b)(3)	

## S18. Services to assist clients at the point entering care

Financial Assessment (Countrywide Form Fill)	<b>Countrywide Products/Services</b>
Financial Assessment (Review Client Completed Form)	
Care Home Contract Review	

## S19. Dealing with Local Authorities in correspondence relating to care funding issues

Financial Assessment LA Liaison (Initial Letter)	<b>Countrywide Products/Services</b>
Financial Assessment LA Liaison (Subsequent Letters)	
Continuing Healthcare Funding Claim (Initial Letter)	
Continuing Healthcare Funding Claim (Subsequent Letters)	

## S20. Nuptial Agreements

Identifies which Package  
drafts the listed document

Pre-nuptial Agreement	Coming Soon
Post-nuptial Agreement	

## S21. Probate Forms

Complete Probate Forms	Coming Soon
Letters to Institution	
Weekly email update to clients	
Terms of Business	
Power of Attorney Document	
Power Reserved Letter	

## S22. Trust Administration

Trust Bank Account	Price on Application
Trustee Meeting (in person)	
Trustee Meeting (conference call)	
Deed of Appointment (Right to Income)	
Deed of Appointment (Beneficiary)	
Deed of Appointment (Assets)	
<b>Deed of Removal (Beneficiary IIP Trust ONLY)</b>	
Deed of Distribution	
Deed of Removal (Trustee)	
Deed of Replacement (Trustee)	
Deed of Retirement (Trustee)	
Deed of Appointment (Trustee)	
Loan Document (Trust to Individual)	
Loan Document (Individual to Trust)	
Loan Document (Individual to Individual)	
Deed of Assignment (Loan) (Trust to Individual)	
Deed of Assignment (Loan) (Individual to Trust)	
Deed of Assignment (Loan) (Individual to Individual)	
Loan Repayment	
Mandate of Trust Income	

### S23. Other Products

Identifies which Package  
drafts the listed document

Client Invoice	<b>Coming Soon</b>
Change of Name Deed	
Parental Responsibility	
Amendments to correct documents	

### S24. Funeral Plans

Funeral Plan - Topaz	<b>Coming Soon</b>
Funeral Plan - Pearl	
Funeral Plan - Sapphire	
Funeral Plan - Ruby	

