

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

CRM System: allows you to manage all of your client interactions, helping you run your business more efficiently.

Marketing Package: including email campaigns, newsletters, marketing letters and much more.

Document Drafting List

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|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| S1. STEP compliance fee | S12. Northern Ireland |
| S2. P.A service | S13. Scotland |
| S3. Wills | S14. Property services & Conveyancing |
| S4. Trusts available within the 'Standard Will' | S15. Deed of Variation and related products |
| S5. Additional services | S16. Cross Option Agreements |
| S6. Pilot Trusts settled by a Will | S17. Reports |
| S7. Pilot Trusts NOT settled by a Will & associated documents | S18. Services to assist clients at the point entering care |
| S8a. Probate Preservation Plus Trust | S19. Dealing with local authorities in correspondence relating to care funding issues |
| S8b. Probate Trust | S20. Nuptial Agreements |
| S8c. Gift Trusts | S21. Probate Forms |
| S8d. Holdover Gift Trusts | S22. Trust Administration |
| S9. Life Assurance Trusts | S23. Other products |
| S10. External Life Assurance Trusts | S24. Funeral Plans |
| S11. England & Wales | |

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

-  **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.
-  **Trust of Residue Package**
You are able to generate these products or documents with our Trust of Residue 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.
-  **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
Will with Distribution to Pilot Trust(s)	Price on Application
Additional Clauses options to be included in the Will	
Agricultural Clause within the Will	Essential Package
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'

Standard Will	Essential Package
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 <small>(Right to Reside/Life Interest/Protective Property Trust)</small>	
Agricultural Trust within the Will	
Business Trust within the Will	
NRB & RNRB Discretionary Trust within the Will	Trust of Residue Package
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)	Countrywide Products/Services
Document Storage Service (per household)	
Urgent Service (per order)	
Reprint of documents (per document)	

S6. Pilot Trusts settled by a Will

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

Family Gift Trust (Bank Account only)	Price on Application
• Trust Bank Account	
Per Extra Family Gift Trust (Bank Account only) to include Trust Bank Account	
Family Gift Trust (Investment other than Bond)	
• Transfer Forms	
Per Extra Family Gift Trust (Investment other than Bond) to include extra transfer funds	
Family Gift Trust (Bond only)	
• 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

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

S9. Life Assurance Trusts

Family Life Assurance Trust	Life Assurance Package
• Deed of Assignment (Life Assurance)	
Family Joint Life Assurance Trust	Coming Soon
Declaration of Trust (Large Life Policy)	Price on Application
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 Package (England & Wales)

LPA - Deed of Revocation
Court of Protection Deputyship Application
EPA - Registration (External drafted documents)

Coming Soon

Business Lasting Powers of Attorney (England & Wales)

LPA - Business incl Registration documents
Review of Partnership Agreement
Review of Articles of Association for Ltd Co.

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

EPA Package (Northern Ireland)

Business Enduring Powers of Attorney (Northern Ireland)

EPA - Business incl Registration documents
Review of Partnership Agreement
Review of Articles of Association for Ltd Co.

Coming Soon

Countrywide Products/Services

S13. Scotland

Identifies which Package drafts the listed document

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

Property & Conveyance

S14. Property Services & Conveyancing

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

S15. Deed of Variation and Related Products

Identifies which Package drafts the listed document

Deed of Variation	Price on Application
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	Price on Application
Deed of Assignment (Life - Shareholders Trust)	
Shareholder Trust	
Shareholder Agreement	
Partnership Agreement	

S17. Reports

Offshore Report	Coming Soon
Onshore Report	
Instruction 102(b)(3)	

S18. Services to assist clients at the point entering care

Financial Assessment (Countrywide Form Fill)	Countrywide Products/Services
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)	Countrywide Products/Services
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)	
Deed of Removal (Beneficiary IIP Trust ONLY)	
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	Coming Soon
Change of Name Deed	
Parental Responsibility	
Amendments to correct documents	

S24. Funeral Plans

Funeral Plan - Topaz	Coming Soon
Funeral Plan - Pearl	
Funeral Plan - Sapphire	
Funeral Plan - Ruby	