

# Document Drafting Software

England & Wales, Scotland and Northern Ireland

Including the new Residential Nil Rate Band



## Essential Package

The Essential Package is paramount to your Estate Planning Business, providing you with **all you need** to complete the sale as well as **personalised Order Summaries** and **personalised Signing Notes** which are generated automatically with our documents, all at the **click of a button**.

### What's included?

- 1 x Software User Licence
- 2 x Desktop Software
- Internet Based Software
- Basic Will - Scotland
- Basic Will - Northern Ireland
- Basic Will - England & Wales
- Deed of Severance

#### Other Clauses within the Will

- Business Clause
- Agricultural Clause
- Foreign Property incl Brussels IV
- Gift of Property
- Discretionary Agricultural Trust
- Discretionary Disabled Trust
- Child Trust

#### Legacies to Trust

- Life Interest in Property Trust (Right to Reside/Life Interest/Protective Property)
- Nil Rate Band Discretionary Trust
- Discretionary Business Trust
- Anticipation of Marriage
- Right to Occupy
- Monetary Legacies within a Discretionary Trust

### New Features

#### RNRB Clause within the Will

**Orders submitted through the software can include:**

- Order Summaries
- Corrections before final documents are produced
- Cancellation Periods managed
- Information saved for submission of second orders

#### Electronic Point of Sale documents

- Personalised Terms of Business, Rights to Cancel and Receipt

#### Personalised Client Disclaimer

- Indemnifies you should you client act against your recommendations
- Based on the products ordered
- Sign electronically

With just the **Essential Package**, can input instructions for all documents and send the information electronically to a Third Party, such as Countrywide, to generate for you. Alternatively, simply bolt on any of our **Plus Packages** and generate your own legal documents, all at the touch of a button.

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[www.countrywidelegacy.co.uk](http://www.countrywidelegacy.co.uk)

