



What documents can be drafted by which Software Packages and what is coming soon to Legacy

This document outlines:

Which Software Package you require to draft each of the stated Legal Documents, Products or Services.

Which documents will soon be available with the Countrywide Legacy Software.

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

Consultants/Advisors 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 people for quick, easy processing thus reducing costs.

View all the benefits that Countrywide Legacy Software can offer here: <https://vimeo.com/246440557/b725ea5fd3>

Written by Experts, used by Professionals.

Our Document Drafting List

Contents

- | | |
|--|--|
| 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 | |

Key

Generate with Software Package

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.

-  **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 the price is on the 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.

Our Document Drafting 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	Coming Soon

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		
Discretionary Trust of Residue (Inc RNRB) within the Will		
Discretionary Trust of Residue		Trust of Residue Package
Interest in Possession Trust of Residue		

S5. Additional Services

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

Identifies which Package drafts the listed document

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)	
Family Personal Injury Trust	
Family Pension Death Benefits Trust	Pension Package
• Nomination of Pension Death Benefits	
Family Investment Probate Trust	Investment Package
• Deed of Assignment (Investment Bond)	
• Investment Trust Bank Account	
Family Life Assurance Trust	Price on Application
• Deed of Assignment (Life Assurance)	

Packages

S8a. Probate Preservation plus Trust - For the principle private residence

Family Probate Preservation Plus Trust (PPPT) or (PPPTOL) with money back guarantee	Price on Application
• 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	

Identifies which Package drafts the listed document

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

Family Additional Property Probate Trust (Second property only)	Price on Application
• 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)	

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

Family Gift Trust (Property only)	Price on Application
• Conveyance	
Per Extra Family Gift Trust (Property only) to include Declaration of Trust	
Per Extra Conveyance	
Family Gift Trust (Bank Account only)	
• 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)	Coming soon
Family Joint Life Assurance Trust	Price on Application
Declaration of Trust (Large Life Policy)	
Deed of Assignment (Large Life Policy)	
Large Life Policy Disclaimer	

S10. External Life Assurance Trusts

Life Assurance Trust Analysis ET (Summary)	Countrywide Products/Services
Life Assurance Trust Analysis ET (Full Client Report)	

Lasting Powers of Attorney & Deputyship

Identifies which Package drafts the listed document

S11. England & Wales

LPA - Health & Welfare incl Registration documents	LPA Package
LPA - Property & Financial incl Registration documents	
General Power of Attorney	
Advanced Decision	
LPA - Registration (External drafted documents)	
LPA - Deed of Revocation	Coming soon
Court of Protection Deputyship Application	
EPA - Registration (External drafted documents)	
Business Lasting Powers of Attorney (England & Wales)	Countrywide Products/Services
LPA - Business incl Registration documents	
Review of Partnership Agreement	
Review of Articles of Association for Ltd Co.	

S12. Northern Ireland

Enduring Power of Attorney (Northern Ireland)	EPA Package
EPA - Registration (External drafted documents)	
General Power of Attorney	
EPA - Deed of Revocation	Coming soon
Business Enduring Powers of Attorney (Northern Ireland)	
EPA - Business incl Registration documents	Countrywide Products/Services
Review of Partnership Agreement	
Review of Articles of Association for Ltd Co.	

S13. Scotland

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

Property & Conveyance

Identifies which Package drafts the listed document

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

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	Coming soon
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)	

Identifies which Package drafts the listed document

S20. Nuptial Agreements

Prenuptial Agreement	Coming soon
Postnuptial 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	Coming soon

S23. Other Products

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	