

James McKenzie

Your Employee Benefits Partner

Will Writing

Trusts

Lasting Powers of Attorney

James McKenzie

"We are committed to providing exceptional service and support to employees. Whether starting a family, buying a home, or considering retirement, we are here to offer expert guidance and support to ensure employee's Wills, Trusts and LPAs are in place and reflect their needs throughout their lifetime."

Andrew Buchan
Managing Director



It's not just Will Writing. **We advise, guide and educate employees.**

James McKenzie is a tried and trusted provider, writing over 75,000 Wills for UK employees since 2007.

We are a specialist Will Writing and advice firm. Our approach to writing Wills is very simple. We want to offer an outstanding service and make the process as easy and straightforward as possible.

We understand the importance of access to financial well-being support and transparency for employees. Providing education and expert guidance is at the heart of what we do.

Our professional consultants are on hand throughout the journey to deliver a personal service with expert advice.

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Our Services

As part of our offering, we provide financial well-being guidance and support for your employees.



Will Writing

We provide Will Writing for employees in England, Wales, Scotland, Northern Ireland and Republic of Ireland. Services include bespoke single and mirror/joint Wills in Standard or Advanced format.

Lasting Powers of Attorney*

We have a specialist in-house LPA team to guide employees through the process and also liaise with the Office of Public Guardian for a seamless process.



Pilot Trusts

We provide step by step guidance and advice for employees with high levels of death in-service benefits or who wish to leave a lasting legacy for future generations.

Will Storage and Amendments**

We ensure that Wills are stored securely onsite in water and fire proof safes. We are also on hand to advise employees on changes or amendments.



***This service is not available to employees in Scotland**

****By separate instruction**



The James McKenzie Way:

Expert advice for all of life's big changes.

James McKenzie is proud to employ expert consultants who care about guiding and advising employees through a bespoke process so they can make the right decisions for them.

Every employee will meet with a consultant to discuss their wishes and ask their questions.

We care about ensuring every employee gets the right advice and that their legal document is as future proofed as possible.

We don't use templated Wills and forms – our services are tailored to every employee's life situation.



Examples of life changes that employees experience:

- Buying a property
- Getting married or divorced
- Having children or pets
- Inheriting from family





Process for employees

> **Scheduling a meeting with a Consultant**

Our Meetings Team will contact the employee within 3 business days asking them to sign our terms of business and schedule their meeting

> **Meeting with a Professional Consultant**

Our Professional Consultant will have an in-depth conversation with the employee to understand their wishes and life circumstances. Our Consultants will advise on how to be as tax-efficient as possible and recommend suitable arrangements for complex situations

> **Drafting the Will and/or LPA**

Once we have all the required information, we will begin the drafting process

We aim to ensure that the employee will have the draft within 14 business days of their meeting

> **Finalisation of their Will and/or LPA**

Once the employee approves, we will print and bind the final version and send it to them by post with full signing instructions

If they elected an LPA service, the Office of the Public Guardian will require registration and checks of the final document





Overview of Will Writing & Powers of Attorney

Why you need a Will?

Without a valid Will, the Government decides what to do with your assets

You will need a Will if you answer YES to any of the following:

- Have more than £5,000 in assets
- Own property
- Have children or are thinking of starting a family
- Living as unmarried partners or planning to marry
- Separated from spouse
- Concerned about Inheritance Tax

Benefits of Writing a Will

- Ensure your children are cared for by the people you want to look after them
- Ensure your assets go to the people you want to leave them to and at the right age
- Ensure that your estate is looked after by your nominees
- Reduce possible unnecessary distress, financial difficulties, lengthy and expensive legal proceedings and exposure to Inheritance Tax for your loved ones

Why you need an LPA?

Lasting Powers of Attorney (LPAs) allow you to appoint your family and/or friends to look after your welfare and your financial arrangements should you lose capacity to do so yourself.

Accidents can happen at any time, to both the young and the old and as we live longer, incapacity issues continue to increase. An LPA is the fastest route for your loved ones to look after you and your affairs should something happen.

LPA overview

- Ensure individuals you know and trust are in control on your behalf
- You need to act now whilst you have capacity as it can take up to 6 months to complete and register
- Stipulate your preferences and instructions in relation to your care and treatment in the event you lose capacity

The two types of LPAs:

- Health & Welfare LPA
- Property & Financial Affairs LPA



The James McKenzie Way:

Accessible and trusted.

We believe all employees should have access to our services and that is why we don't have a set up fee for employers.

Our service can be implemented into your HR platform or a bespoke URL. We are a trusted provider and ensure that we adhere to all security and data protection protocols.

Employees pay one price with ease - we don't have any additional or hidden costs. The cost of the service can also be payable in 12 monthly instalments which make us accessible to all.



Andrew Buchan is a member of The Society of Will Writers





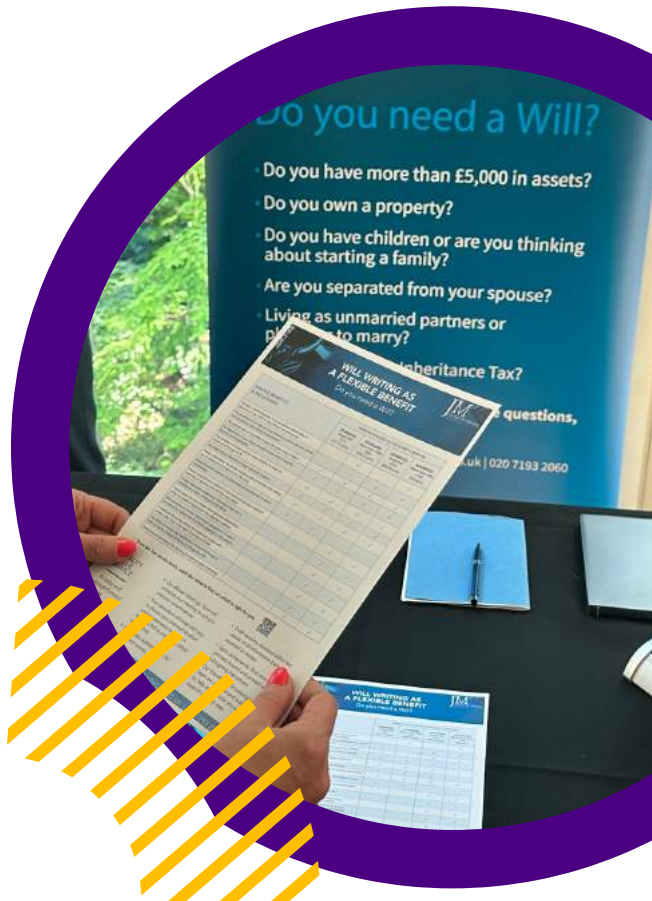
The James McKenzie Way:

Empowering through education, support and guidance.

Navigating legal jargon and understanding how decisions now can impact one's family can be daunting. That is why we focus on educating employees and equipping them with knowledge so they can decide on what works for them and their families.

Each employee's circumstance is unique and we help employers create a benefit that is engaging and educational for all.

As part of the service, we collaborate on creating tailored webinars, co-branded educational collateral, live Q&A sessions with expert consultants, roadshows, and bespoke videos.





Tools and resources we provide inclusive of our Marketing Menu

Every company is unique and so are their employees. That is why we tailor our webinars, resources, and benefit engagement materials according to our partner's strategy and their employees.

Our all-inclusive support includes:

- Tailored Webinars with Live Q&A with an expert
- Educational Videos on Financial Wellbeing
- Guides and FAQs
- Roadshows and benefit events



Your Climate Positive Partner committed to investing in nature.



JM

CLIMATE
POSITIVE
BUSINESS



We are proud to say we are a **Climate Positive Business**. This means we are removing more carbon than we are producing in a way that benefits nature and the climate as a whole.

We partner with Earthly to invest in nature and do our part to reverse climate breakdown.



Your Living Wage Employer Partner committed to paying employees fairly.

JM



We believe our staff deserve a wage that meets everyday needs and we are proud to say we are an accredited **Living Wage Employer**.

We have joined thousands of businesses and people who truly believe a hard day's work deserves a fair day's pay.

Our employees are integral to us as a business and we are committed to helping them secure their future.





Any queries? Email the team



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Speak to the team today

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