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THE SURPRISING BENEFITS OF OUR SUBSCRIPTION BASED ESTATE PLANNING SERVICE

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Goodwills Trusted Outcomes Ltd

WE GIVE YOU THE TOOLS THAT MIGHT
CHANGE YOUR LIFE. CAN YOU USE
THEM TO THEIR FULL POTENTIAL?



The Goodwills Trusted Outcomes Subscription Based Estate Planning Service offers you a complete estate planning service for just £80+ Vat per month.

You have the potential to reduce your future monthly premiums down to £0, after just one monthly payment has been made. You need to introduce four others that could benefit from our service too.

You also have the potential to receive over £260,000 in income payments within 28 months.

Can you make this work for you?

OUR PROPOSITION



- We want to offer you thousands, tens of thousands or even hundreds of thousands of benefits for an affordable monthly subscription fee.
- We want to provide a service that is ongoing, and that offers excellent value for money.
- Whether you are 20, 40 or 80 years old, we make NOW the right time to deal with your estate planning.
- We want you to be able to reduce your monthly subscription fee down to zero, by introducing a low number of new people to our services.
- For each person you introduce that becomes a client, we can reduce your monthly subscription. If you introduce five people, we will reduce your subscription down to zero whilst they are active subscribers.
- We also offer the ability for you to build a growing income based on the introduction of new members introduced by other members.



SOME FACTS AND FIGURES

- We offer a package that individually priced, would cost more than £5,000 for a subscription of just £80 per month plus VAT.
- Whether you are a single person, or a couple, the total subscription fee is £96 per month. This includes VAT.
- Your subscription is reduced by £24 for each of the first four people you introduce. totalling £96.
- We don't lock you in, unfairly. You can cancel at any time, and you will only need to pay for the products or services you have already received.
- If you introduce four people in your first month who all become clients, you will pay £96 upfront, and then assuming they remain subscription-based clients, you will have nothing further to pay. Be aware though, that people will die, and people will cancel. You can introduce more people though if this occurs.
- If you introduce one person per month for four months, then you will pay (with the same caveats as above) £240 for a package that retails for £5,000 and could provide benefits worth tens or even hundreds of thousands of pounds for you and your loved ones.

WHAT DO WE OFFER FOR YOUR SUBSCRIPTION?

PEACE OF MIND!



- An initial strategy meeting, where a bespoke strategy is put together for you, that meets your needs and objectives. This includes full advice and recommendations.
- Single Will / Mirror Wills with custom clauses as required.
- Lasting Powers of Attorney for both Health and Welfare and Property and Financial
- Will Trusts (as required)
- All documents are completed by us, printed by us, and posted to you with clear signing instructions, and plain English support documentation.
- Document Storage and £10 updates for your Will and Will Trust as required.
- An annual review, and or telephone advice and support for up to 90 minutes per year inclusive in the subscription.
- Bereavement support for your executors, and also for you if you are named as an executor in another Will, even if it wasn't made with us. Optional probate and estate administration service capped at 1% if required.
- A proactive service, We will contact you when there are legislative changes, and periodically to ensure your circumstances haven't changed and everything remains current and up to date.



WHAT'S THE CATCH?

- We aim to make this agreement as fair as possible, but it needs to be fair to us, and to you. We should not take risks that affect the ability for us to run this programme for all our members.
- For this reason, we put the strategy in place, and provide the advice and recommendations once the first premium is paid.
- We will put the Will in place after six subscription periods have been paid or deemed to be paid (deemed means where no payment is due because you have introduced new members, and your subscription is reduced, or zero). You can get around this by paying 6 payments up front.
- If you pay 4 payments upfront, these can be refunded or partially refunded if people you introduce subsequently join within six months, as if you had paid them monthly.
- All other products and services (Lasting Powers of Attorney, Will Trusts, bereavement advice and capped price probate and estate administration services) are put in place from month 18. You can get around this by paying 12 payments upfront.
- If you pay 10 payments upfront to ensure these benefits are put in place straight away, these can be refunded or partially refunded if people you introduce subsequently join within 10 months (14 months if you do this in conjunction with the will fee too), as if you had paid them monthly.
- We subsidise the products we put in place at month 14 (or earlier if you pay in advance), so if you cancel your agreement before this is fully funded, an amount may become due. We will discuss this further before we put your products in place.

OUR THOUGHTS



- It is always better to put your documents in place as soon as possible, so if you can afford to, we recommend you should make the upfront payments, and we will ensure you do not lose out because of this.
- On the flip side, without our solution, if it will be many years in the future before you are likely to put your solutions in place, due to the cost, your priorities etc, then our subscription solution is potentially a good option.
- At the end of the day, nobody knows for certain what tomorrow will bring.

DID YOU SAY INCOME?

- Yes. Once you have introduced five people, you can earn an income from other members that you don't personally introduce too. We can't guarantee how much this will be, as we don't know how many people each person will introduce, or how long they will remain clients.
- If everyone introduced five people, at a rate of one per month for five months, including yourself, the income has the potential to rise to over £250,000 per annum in under three years. We cannot guarantee this though - anything you earn will be a bonus. All we can do is guarantee the mechanism is there to earn it.
- Some members will introduce more than four people, others less, some none at all. Some will cancel, people will die, so income cannot be guaranteed. This is just an example.

If you subscribe to our estate planning service, introduce one person a month for the first four months and other members do the same, this will be your financial position over 28 months.

Month	Personal Introductions	Total Team Size	Expenditure	Income	Net Total	Running Net Total
1	1	1	96	£0.00	£96.00	£96.00
2	1	3	72	£0.00	£72.00	£168.00
3	1	7	48	£0.00	£48.00	£216.00
4	1	15	24	£0.00	£24.00	£240.00
5	0	30	0	£26.00	£26.00	£214.00
6	0	59	0	£55.00	£55.00	£159.00
7	0	115	0	£111.00	£111.00	£48.00
8	0	222	0	£218.00	£218.00	£170.00
9	0	421	0	£417.00	£417.00	£587.00
10	0	776	0	£772.00	£772.00	£1,359.00
11	0	1373	0	£1,369.00	£1,369.00	£2,728.00
12	0	2309	0	£2,305.00	£2,305.00	£5,033.00
13	0	3668	0	£3,664.00	£3,664.00	£8,697.00
14	0	5487	0	£5,483.00	£5,483.00	£14,180.00
15	0	7726	0	£7,722.00	£7,722.00	£21,902.00
16	0	10256	0	£10,252.00	£10,252.00	£32,154.00
17	0	12875	0	£12,871.00	£12,871.00	£45,025.00
18	0	15354	0	£15,350.00	£15,350.00	£60,375.00
19	0	17493	0	£17,489.00	£17,489.00	£77,864.00
20	0	19168	0	£19,164.00	£19,164.00	£97,028.00
21	0	20352	0	£20,348.00	£20,348.00	£117,376.00
22	0	21101	0	£21,097.00	£21,097.00	£138,473.00
23	0	21520	0	£21,516.00	£21,516.00	£159,989.00
24	0	21724	0	£21,720.00	£21,720.00	£181,709.00
25	0	21808	0	£21,804.00	£21,804.00	£203,513.00
26	0	21836	0	£21,832.00	£21,832.00	£225,345.00
27	0	21843	0	£21,839.00	£21,839.00	£247,184.00
28	0	21844	0	£21,840.00	£21,840.00	£269,024.00



IMPORTANT INFO

- Subscriptions are nonrefundable unless you cancel within 30 days of your first subscription, and you have not received your strategy meeting. This is not a savings plan; the subscription is a management fee.
- If you die (or if both of you die for a joint case) your estate will not be liable for any payments outstanding unless you are behind on your subscriptions.
- Our fees do not include any third-party fees, such as fees due to the Office of the Public Guardian for registering a Lasting Power of Attorney, or Estate Agent fees for selling a property.
- All documents are produced by Goodwills Legal Services Ltd, a 20-year established law firm, which holds Professional Indemnity Insurance, as is a member of the Professional Association of Legal Services (PALS) for your peace of mind.



ANY QUESTIONS?

- Everything will be explained in full during our consultation, but if you have any burning questions, please call us on 0800 772 0835. Alternatively, you can email us at info@goodwills.email.
- Ready to get started? Click here to book your initial consultation, and one of our trained consultants will call you at the agreed time to get started with your strategy meeting.

CONTACT INFO



- **Subscriptions, Strategy, Advice and Client Support provided by:**

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- **Legal Document Queries:**

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