



bequeathed 

free wills, valuable advice

SO GOOD
THAT THE COUNTRY'S
BEST LAW FIRMS
USE IT

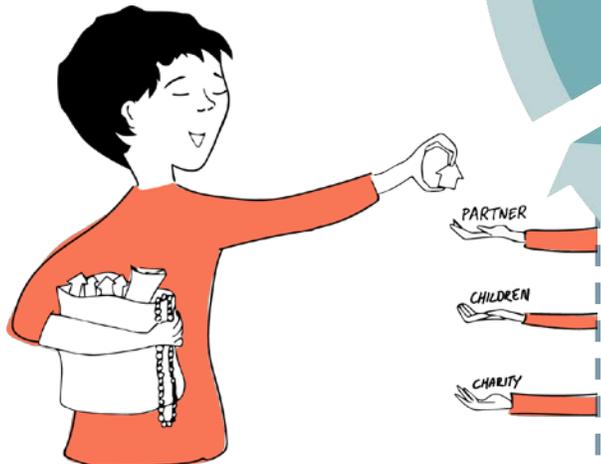
BEQUEATHED IS...



...a site to do a free online will (and opt to leave a legacy), which highlights where a user may benefit from paid telephone or face-to-face advice from...

...law firms, who pick up where the user stops, and who also use and promote the site to generate new business, which distributes...

...systematised giving prompts to thousands more testators, which attracts more charities to fund our marketing of...



HOW WE DO IT



Legacy lead generation – we systematically deliver giving prompts to people making their wills online and with law firms



Legacy lead conversion – we provide online (free), telephone and face-to-face (paid) options so more people complete a will



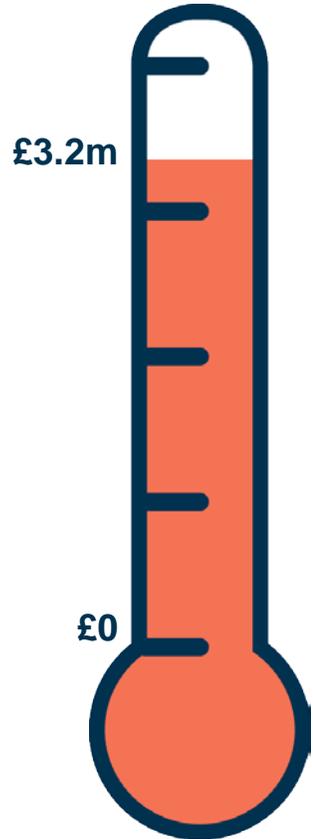
Legacy reporting – we compliantly capture data at every step of the legacy marketing funnel (for online, telephone and face-to-face) for effective governance and actionable insight



Legacy stewardship – we help people maintain their will, creating the chance to maintain the relationship with their chosen beneficiary charities



WHAT WE'VE ALREADY ACHIEVED



Our 6-month pilot generated £3.2m in pledges from PPC traffic alone

Gifts were pledged to many niche causes as well as household-name charities

All users started with no charitable intention at all, yet 20% pledged

The ROI to our subscriber charities was 400%

Six major charities trusted us with their reputations



WHY YOU CAN TRUST US TO DELIVER



A proven, mature tech platform

Developed over 5 years with hugely experienced solicitors, hosted onshore with Rackspace subject to ISO 27001/2, maintained by the company that supports GSK, Shell and Suzuki.



Underpinned by the very best law firms

We only work with the 20% of firms that have earned Lexcel or ISO accreditation. They've vetted Bequeathed as suitable for their fee earners, clients and prospective clients.



Providing solutions tailored to individuals

Online or offline, with us or with a good law firm, our system helps people identify the things they should think about and take the route to making a will that best suits them and their needs.



In a sustainable business model

Our panel firms promote our charities to 1000s of testators per year, lowering our user acquisition costs. Because Bequeathed benefits their business development, they pay to take part which means we can make our service available to charities at a reasonable cost.



FREQUENTLY ASKED QUESTIONS

Who is behind Bequeathed?

Jon Brewer, former solicitor and LexisNexis director, developed the concept while working for the acquirers of his first legal software business. Jon bought back the wills IP to launch Bequeathed with his team. Simon Hetherington, former publisher of Halsbury's and EF&P, heads up legal content and Pier Thomas leads all things finance and operations

What is the consumer value proposition?

We enable a user to generate an online will for free, with online guidance and support to help a user progress and complete their will. We ensure they identify the issues they may not have thought of where expert legal advice may be valuable or worthwhile. If a user chooses to seek paid-for advice, the law firm picks up in the system where the user stopped, saving time and money.

Can we trust the will-writing software?

Yes, it has been used to generate around 1800 wills to date.
Yes, our panel law firms trust it to write wills for their clients and for clients to use for themselves.
Yes, it's been developed over 5 years, by our expert team including Trust & Estate Practitioners and solicitors.

What about the risk of undue influence, fraud and capacity?

We address situations where a user is being helped by someone else.
Our online interaction with customers means fraudsters are more likely to be discovered than on other systems or paper DIY packs.
Our system systematically addresses capacity and we refer to our panel law firms where there is any doubt.

How much does Bequeathed cost?

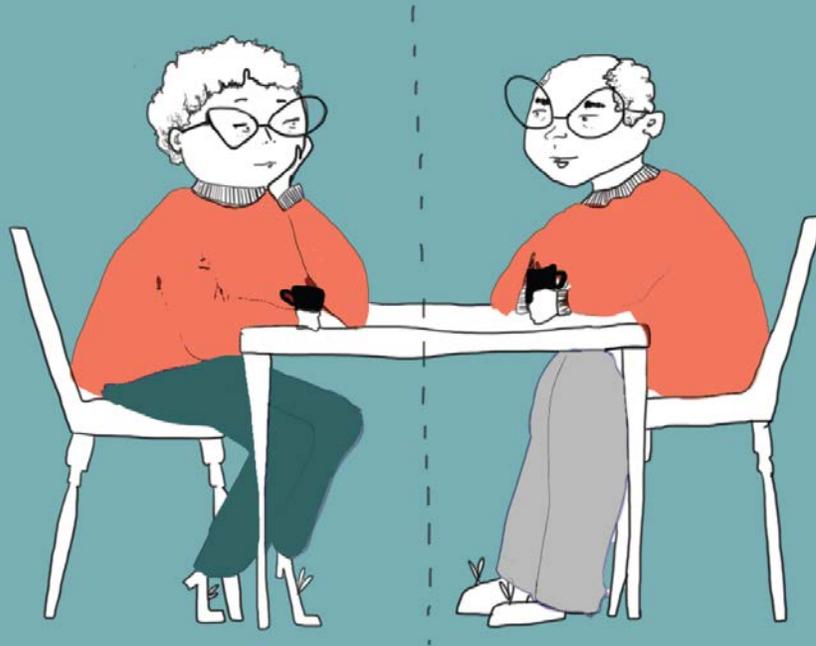
Charities pay a fixed fee annual subscription of 0.0003 x their last reported year's total voluntary income, subject to a £2k minimum. There is no cost per will – we'll process as many supporters as use the service and prospective supporters as our law firms introduce. There are no limits on the volume or value of gifts pledged.

Do you comply with all necessary regulations?

Personal data is stored securely in Rackspace UK data centres and data processing is GDPR compliant. We are contractually bound to – and do – comply with all regulations, including those recently issued by the Fundraising Regulator. The contract provides, in detail, for what we can and cannot do without our charity customers' agreement.



READY TO MEET



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