



bequeathed

free wills, valuable advice

BEQUEATHED IS...



A website that helps consumers do a will (with a charitable gift if they wish), some of whom need paid advice from...

Recommended law firms, who use our software to improve service and profitability, which distributes...

Systematised prompts to consider a gift in a will to charity, which attracts more charities to fund our marketing of...



BEQUEATHED HELPS LAW FIRMS



Get valuable new private clients from channels that no one firm can reach on its own.



Avoid spending time and money on clients who would not be profitable to serve.



Deliver a highly differentiated, will-writing service to win against local and national competition.



Improve matter profitability on wills and build life-time value of private clients.



THINK OF BEQUEATHED AS A SALES FUNNEL FOR PROFITABLE PRIVATE CLIENTS

We generate leads from PPC, from SEO, inbound links on charities' legacy pages and through our panel firms' sites that promote the service to attract local prospects, ahead of their competition

We establish relationships with people by reacting to their decision to make a will and enable them to start the process online immediately

We develop relationships by helping people through an online interview that gathers their information, with 24-7 guidance and friendly paralegal chat support

Where people do not require legal advice, we enable them to get what they need by system-generating a will ready for execution

That leaves users who come to the informed decision they need or will benefit from paid advice from you

We provide you with a user's interview and a draft will in Word

You agree the client retainer

You get a valuable new client



CONSIDER THE POTENTIAL COMPETITIVE ADVANTAGES BEQUEATHED BRINGS

VERSUS

Local traditional law firms

- What if a consumer could start the will-writing process from your website as soon as they were ready, rather than wait for your competitors to open in the morning or after the weekend?
- What if they received the remarkably confident and different offer that if their needs are straightforward, the service is free.
- What if they received immediate, enthusiastic and knowledgeable online support from us, with your firm on standby for situations where paid-for advice will be really valuable?
- Why would anyone start their will with any other firm in your area?

VERSUS

Co-Ops's expanding reach

- Co-op's 2017 Interim Report states:
"[Co-op] allows people to start making their will online 24 hours a day, 7 days a week. We then provide a follow up telephone call with a wills specialist to discuss individual circumstances ... [we are] developing our [1000+] Funeralcare branch network ... to introduce some of our legal services (will writing and probate in particular) to our members and their families."
- What if there was an alternative online service to Co-op that was free? What if someone could use the money they would have spent on a Co-op will on your value-add advice?
- Why would anyone choose Co-op?

VERSUS

Online will-writers

- What if there was an online will-writing service that was trusted by well-known charities and talked up the benefits of good legal advice rather than put it down?
- What if there was support for the user to make their will for free whenever possible but the user could get regulated legal advice from a law firm near to them when it was worthwhile?
- Might that rapidly stop the unregulated online providers seeking to take business away from solicitors?

IF BEQUEATHED SUITS YOUR PRIVATE CLIENT STRATEGY... GET IN TOUCH

Do you want to extend the business development reach of your private client department?

We have the online assets to drive and attract will-writing traffic that no one law firm could ever develop and maintain on its own.

We are trusted by charities, who recommend us (and through us, you) to their supporters.

We believe there is scope to work with other introducers and help you recruit regional charities..

Do you want to target clients with more complex ongoing needs?

We meet many peoples' will-writing needs online who would often be unprofitable for you to serve.

We maintain the user relationship so it's you they come back to.

For every 1 online will we have another 2, usually 65+, who start online but find they need legal advice.

Do you want help converting warm leads?

People who invest time in our interview are more likely to take advice from their local Bequeathed panel firm than start over with another.

We present your firm's relevant advisory services, manage expectations about cost and can pre-sell services such as LPAs and professional executor services.

Do you want to enhance margin and lifetime value?

The clients we recommend need advice and are worthwhile onboarding.

Your firm receives the interview for your file and a Word draft of the will, which lowers cost to serve.

It means you more quickly get to the expert advice where you can showcase the value you can add now and in the future.



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. The 6 month pilot was funded by 6 leading charities and raised £3.2m in gifts from 1500 wills in 6 months. Jon bought back the wills IP to launch Bequeathed with his team, including Pier Thomas (finance/ops) and Simon Hetherington (legal content)

How much does Bequeathed cost?

The cost to license the Bequeathed brand and service will vary from territory to territory, which is available exclusively versus other firms. There is no charge for referrals: we provide you with valuable new business but you help more of our users complete their will. Your fee includes unlimited internal drafting and client use and the support we provide to your prospective clients to prepare them.

Can we trust the will-writing software?

The system generates a first draft of the will for you to amend in Word. You are in complete control of the final draft. The will drafting logic has been developed over four years by our legal team, including Simon who used to publish Halsbury's and EF&P. It has been used to generate around 1800 wills to date, directly by users and by law firms on behalf of clients.

What about the liability for wills written?

You only become liable once a user becomes your paying client, on your terms. We are liable in contract and tort to our consumer users and we carry PI insurance covering that risk. You will not be held out on the site as being responsible for free wills.

Won't the offer of free wills erode our business?

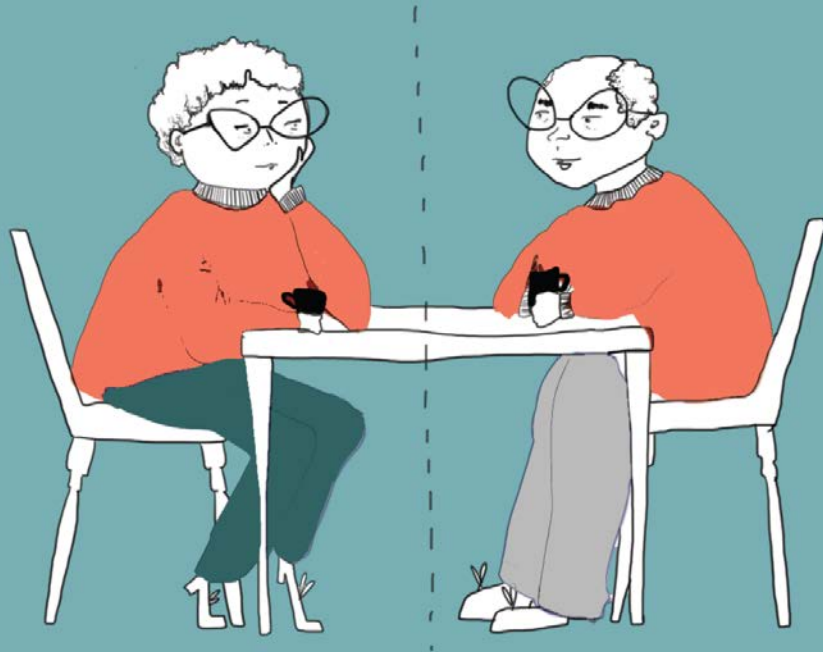
If the profit of your practice relies on straightforward, one-off wills then Bequeathed is unlikely to be suitable for you. For most firms, it's an elegant device for qualifying out those it is not profitable to serve while establishing a relationship for the future. We think its your competitors' business that will quickly erode.

Is there any IT set up or integration?

No, Bequeathed is an entirely hosted, pen-tested service with all personal data stored securely in UK data centres with Rackspace. You simply register on Bequeathed as a user and we'll give you lawyer editing permissions, set you up for notification of referrals etc. We will also create a unique link for you, so we can serve people who use it as your clients and prospective clients.



READY TO MEET



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