



bequeathed 

free wills, valuable advice

Join with us to win new profitable
private clients ahead of your
competition

BEQUEATHED HELPS LAW FIRMS



Cost-effectively reach new prospective private clients via the web, charities and financial advisors.



Generate qualified leads of consumers who need legal advice and are prepared to pay for it.



Make the case for choosing a solicitor as a professional executor and secure the appointment.



Reduce time spent on initial interview and first draft of a will to improve margin and quicken client service.



THINK OF BEQUEATHED AS A SALES FUNNEL FOR PROFITABLE PRIVATE CLIENTS

We generate will-writing leads from the Internet and from promotion by our charity customers, our law firm customers and our channel partners (including financial advisors), all of whom share an interest in enabling consumers to make the right will

We establish relationships with our users online by enabling them to start the process immediately, whatever the time of day or night – and we prompt them to consider a gift in their will to charity (generating £3.2m in pledges in just 6 months)

We do as much as we can to help users make their will for free through 24-7 guidance and friendly paralegal chat support. So, when we recommend legal advice, they trust that we're thinking of their best interests not ours.

Users' interview answers system-generate a draft PDF will that is downloaded for free, with guidance on execution and storage: some free users still select our firms as professional executor.

To users who choose paid legal advice (who tend to be older or have more complex needs), we promote our law firms

We transfer the interview and draft will in Word to the law firm so it may consider the prospective client's needs

The firm speaks with the prospect, agrees the retainer and fee

The firm gets a valuable new client





Bronze

List with us as one of the firms to whom we can refer users in your area who need (and are prepared to pay for) legal advice

For new clients who we introduce (as well as your own clients), use Bequeathed to more cost-effectively create first drafts of wills ready for editing by you in Word

£600 per year per office – no referral fees

+ Silver

Provide local businesses with a unique link to our site for them to distribute to staff and customers - your firm alone is recommended to those who use the link

Offer two regional charities our legacy fundraising service for free for 12 months, with their supporters directed to your firm for advice when needed

£1800 per year per office (includes 2 charities at no cost, £600 per year per regional charity thereafter) – no referral fees

+ Gold

Or, just like our early adopter law firm customers, secure the competitive advantage of Bequeathed exclusively versus other law firms in your area

Offer our legacy fundraising service free for 12 months to as many local charities, employers and businesses as you can

From £3600 per office per year (depends on the population in your town; City territories will be more) – no referral fees

FREQUENTLY ASKED QUESTIONS

Who is behind Bequeathed?

Jon Brewer, a former solicitor and LexisNexis director, developed the concept while working for the acquirers of his first legal software business. The 6 month pilot in 16/17 was funded by 6 leading charities and raised £3.2m in gifts from 1500 completed wills in 6 months. Jon bought back the IP in 2017, launching Bequeathed with his team in June 2018.

What has Bequeathed achieved so far?

Since launch we've signed up twelve major charity customers and five Lexcel-accredited law firms covering 18 offices. Our first law firm customers are already recruiting charities and major local employers as introducers. We are now taking on national channel partners (including Openwork financial advisors) to promote Bequeathed to staff and clients.

How do financial advisors work with Bequeathed?

Advisors make clients aware of the convenience of Bequeathed to encourage more of them to make the will their families need them to have. Bequeathed helps those clients consider all the key issues, leading to informed decisions of when legal advice will be beneficial. So, Bequeathed helps advisors increase the volume and quality of leads for trusted law firms through an arm's length, guided process.

Can solicitors trust the software?

The system generates a first draft in Word. You are in complete control of the final draft. Our law firms prefer it to other drafting software. The drafting logic has been developed over 5 years by our legal team, which includes former solicitors and a publisher of Halsbury's and EF&P. It has been used to generate thousands of wills, directly by users and by law firms on behalf of their clients.

Won't free online wills erode law firms' business?

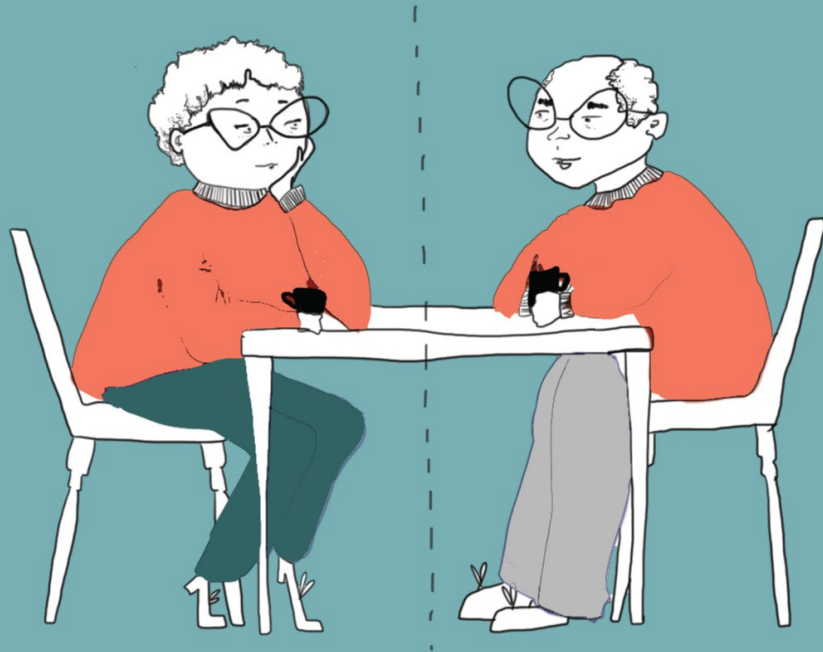
There's little to no margin in will-writing anyway, so it pays to focus on getting in more clients who need and are willing to pay for expertise. Online will-writing companies are luring consumers away from law firms, targeting will-writing and probate, so firms need to get online. Our online will-making service is free, attracting consumers to make their will in a way that includes rather than excludes law firms.

What about the liability for wills written?

You are not held out on the site as being responsible for free online wills. The responsibility for our consumer users is ours and we carry PI insurance covering that risk. You only become liable once a user becomes your paying client, on your terms.



READY TO MEET



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