Suggested marketing letter from Pavilion Row

**‘Will Review for your clients’**

Modify as your wish

<Address Details>

<Date>

Dear<>

**<Your Business Name> - Will Drafting and Review Service**

As I know you will appreciate, Estate Planning is one essential part of the overall financial planning process and we are therefore delighted to offer access to a ‘Will drafting and Review Service’ as an extension to the ongoing service we already provide to you.

There are many reasons why you should make a Will and the enclosed flowchart *‘What happens if you don’t write a Will’ clearly* shows that should you die intestate, your assets will not necessarily be passed to your loved ones in the manner you intend.

Equally important is to ensure that any existing Will is kept up-to-date in order to take account of the almost inevitable changes in your personal situation (i.e.: family, business or general wealth), as well as to make sure your nominated beneficiaries and Executors are still appropriate.

Indeed, legal professionals recommend that your Will should be reviewed and updated at least every 5 years.

In the light of this, we have arranged a **Will Review Service** with a specialist firm with which we enjoy a close working relationship**.**

Once they have reviewed a copy of your existing Will, one of the firm’s STEP(Society of Trust and Estate Practitioners) qualified consultants will contact you to discuss whether the included provisions meet your desired objectives while highlighting any issues.

Alternatively, if you do not currently have a Will in place, the firm will be delighted to discuss your circumstances, agree your requirements and draft any necessary documents.

I will be pleased to give you a call early next week to explain the proposition further.

However if you would like to take advantage of this service immediately then, please don't hesitate to contact me.

Yours sincerely

**Will writing involves the referral to a service that is a separate and distinctive to those offered by <YOUR BUSINESS NAME>. Wills are not regulated by the Financial Conduct Authority.**