

Silver Lining

ESTATE PLANNING



Looking to Grow Your Financial Services Business in 2012?

...then be part of Silver Lining's

WILL WRITING
for Financial Advisors
programme





“...expanding your services to include Will writing makes sense.”

With big changes to financial services planned in 2013, expanding your services to include Will writing makes sense. Almost 2 out of 3 people have no valid Will in place, giving the professional instruction taker a huge market to aim at.

How do I do this?

By being part of Silver Lining Estate Planning's Will Writing for Financial Advisers programme you can incorporate Will writing into your portfolio of services and develop a significant additional income stream. Average earnings of £500 per case are not unusual and in some instances a single case can comfortably earn you £2,000+. The programme equips you to take instruction in Will writing and estate planning and after the course we will still be there to help you all the way. You will be covered by our PII for the client consultation and any documents we produce.

Why should I do this?

- Offering Wills and estate planning is a natural extension to the services you already provide and great way to increase your income.
- Each new Will client can give you access to at least 6 new prospects for Wills and financial services.
- With us you set your own pricing structure and profit margins.
- There are no franchise fees, and no ongoing monthly fees. You simply pay us to train you and produce the relevant documents (for which we charge a fixed fee rather than a percentage).

By the end of the course you will be able to take instructions for complex Wills, Trusts and Lasting Powers of Attorney and after the training we continue to help you with our unique and high level 1-2-1 support.

*With our **Will Writing for Financial Advisers** programme under your belt you now have a compelling reason to revisit existing and dormant clients and generate more referrals from them.*



What does the 2 day programme cover?

Will Writing for Financial Advisors includes :-

Day 1:

- The Law of Succession and problems with intestacy
- The market and its relevance to financial advisers
- The family home and severing the tenancy
- Dealing with businesses in a Will and Business Property Relief
- Legacies and Devises
- Claims against an estate and I(PFD) Act 1975
- Taking instructions – your responsibilities
- Modern uses of Will trusts (or how a little sophistication can put you way ahead of the game)
- Protecting the estate against remarriage and care fees
- Clients in second marriages
- PPTs, FLITs, IOUDWTs and other Discretionary Trusts

Day 2:

- Lasting Powers of Attorney – importance and income potential
- Lifetime trust planning to protect the family home and avoid unnecessary IHT
- Pricing levels and how to apply them
- Marketing and prospecting
- Interactive session working on specific examples
- Post-course support and assistance

A detailed agenda will be provided prior to the course.

Where are these courses held?

Courses are held in Ipswich and at other locations, dependant on demand. For larger firms courses can be delivered at or near to your business premises.

How much does it cost?

Your investment is two days of your time and **£375 + VAT** per delegate, inclusive of lunch and refreshments. A **discount of £75** is also available for each friend or colleague that you introduce to us who attends the programme.

Contact us

Call **0800 0934299** today to find out when there is a training course is near you, or simply send an e-mail to **info@silverliningep.co.uk**.

Who are Silver Lining Estate Planning?



Steve Wilkes
Head of Estate Planning
Silver Lining Estate Planning

Silver Lining Estate Planning are an established firm of estate planning specialists that have a reputation in the industry for professionalism and integrity. They have never had a claim on their PII and have never had a Will fail at probate. Their membership of the Society of Will Writers (SWW) and Trust and Security Network (TAS) means that they have strict PII requirements (up to £2.5 million for each client), provision in place for the failure of the business or death of a director and their PII covers you for any documents they produce.

Here's what previous attendees say...

"I have just returned to the office after spending an enlightening two days being trained by Steve Wilkes on Wills, Trusts, Power of Attorney issues and Estate Planning. Steve has an incredibly deep knowledge and understanding of this crucial and often overlooked area of financial planning. He has built his product offering in such a way that the services that they can deliver exactly the right results for everyone; regardless of their circumstances or requirements. I have worked with similar professionals in the past, however Steve is certainly the best in his field. I am very excited by the further opportunities that working in partnership with Silver Lining presents for our business, and certain that we have found the right provider for this type of work for our clients."

- Craig Fookes, Future Secure Wealth Management

"I found the course interesting and informative, presented by someone who obviously knows his stuff! I would have no hesitation recommending the course to any of my financial services colleagues who are looking to set themselves apart from the competition by offering their clients another valuable service."

- Paul Davies, Phoenix Financial Solutions

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