



# COMPANY & PARTNERSHIP OVERVIEW

## Why Become an Affiliate?

First of all – **it's free**. You'll earn a commission on every sale, have the ability to offer discounts to your users, and be partnering with the #1 Online Will Provider for England and Wales.

Interested? Take a look through our brochure and pick an option that suits you best. We'll set everything else up for you.



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**U.K. LEGAL WILLS**

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COMPANY & PARTNERSHIP OVERVIEW



2016

## The Will Writing Business

### Every Adult Should Have a Will

Why? Here are a few reasons:

#### A Will allows you to describe the distribution of your estate.

Without a Will, one's estate would be divided according to intestate laws; essentially, you would have no control over where, or to whom, your assets go.

**It allows you to name an Executor/Trustee.** This is the person who will be responsible for carrying out your final instructions. Without a Will, the courts make this decision, which often leads to family fighting in a time that should be left for grieving.

**It is how you name a guardian for your children.** A Will lets you have a voice after you've passed. Without one, you have no say in what happens after your death. This means that a judge will appoint a guardian to your children, rather than you.

### Why are Most Adults Missing a Will?

Wills are extremely important, so why do so few adults have one, and even fewer have one that is up to date?

**"It's too expensive"** is one of the most common misbeliefs. With a solicitor you could expect to pay thousands, but that isn't the only option anymore.

**"It takes too much time"**; another common misconception. While visits with a solicitor are inconvenient, the same Will could be made with us in no time.

**Other common excuses** include procrastination, wanting to wait for an important life event, assuming you have too little to leave behind, and assuming that your assets will go to the right people without a Will.

When you can solve these problems, your market potential is huge – just check out the stats on the right.



FAST FACTS

60%

Of adults in the U.K. **do not** have a Will.

84%

Of adults in the U.K. under 34 **do not** have a Will.

FOR MORE INFORMATION

The survey data comes from an article written by moneywise.co.uk.

VIEW THE ORIGINAL ARTICLE AT <http://www.moneywise.co.uk/news/2011-10-24/more-60-uk-population-dont-have-will>

# About Us

At LegalWills.co.uk, we are the market leader in online Will services for England and Wales.

We provide the tools for people to create their own legal Will, Living Will, Expatriate Will, and more.

**“Our mandate is to allow people to create common legal documents in a very easy, convenient, private, secure and cost-effective manner, without the need to pay the high expenses of a solicitor. We go far beyond any do-it-yourself kit or online repository of legal forms and documents. If you wish, all of your legal documents can be stored and maintained by you online, in a completely private and secure manner. This will ensure that you can keep it updated to reflect any changes in your financial or family situation.”**



We also offer our services in Canada and the United States.

We were established in 2001 in Canada, 2003 in the U.S., and 2005 in the U.K.

We have helped hundreds of thousands of people to create their Will, and have never once heard of a single Will having a problem in going through probate.

Note that we are not a legal firm, but that we have solicitors on staff and that all of our services have been created by solicitors in the U.K.

## GREAT CUSTOMER SERVICE

We have a 99% satisfaction rate, phone and email support, and a 30-day money back guarantee.

Your users' satisfaction means a lot to you, and it does to us too.

Check out our reviews on page 7.

# What Makes Us Different?

The service is provided by fully interactive software; it guides users step-by-step based on their family situation, customised to their jurisdiction.

For example, legally you must include your spouse and minor children as beneficiaries. If a child is a minor, they must have a trust set up and a guardian named. You should then cover alternate scenarios in which both parents pass (i.e. a car accident); alternate executors, a residual beneficiary, and an alternate residual beneficiary must be named.

*We cover everything.*

We use the same software that many solicitors use to prepare Wills for their clients - except they charge hundreds for it.

A blank form Will kit will not guide you through any of these situations. There is a significant chance of a simple “fill in the blanks” Will not working.

We provide users with the option to have their Will reviewed by a solicitor.

Having been in the business for over a decade, we have a proven record of success. Our service is trusted, recognised, and it works.

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Have You Included Your Family? [Get more](#)

Just a reminder. Be careful if you have decided to disinherit your wife (Vivian Reet Raud), or any of your children, as they may have a claim on your estate.

Have you included your wife (Vivian Reet Raud), and all of your children in the distribution of your possessions?

Yes.

No, but it was intentional.

No. I would like to go back to make changes.

I'm not sure. Let me go back to review my decisions.

< BACK    SAVE    NEXT >

*A reminder that we give when a user disinherits his or her spouse.*

*We are not a fill-in-the-blanks Will Kit, our service is highly interactive, and takes into account everything that the user writes in.*

# The LegalWills Advantage



## Solicitors

- Overpriced
- Inconvenient
- Hard to update
- Intimidating process



## Blank Forms

- Error-prone
- Quickly out-of-date
- Not specific to jurisdiction
- Too simple



## LegalWills

- Affordable
- Convenient
- Easy to update
- Checks for mistakes
- Can handle quite complicated situations
- End product is the same as a solicitor's Will

### VALUE-ADDED SERVICES



MyLifeLocker

#### MyLifeLocker Executor Tool

Users can document their assets and important information in a secure place, which can be printed and stored with the Will or managed entirely online.

The user can then set people up as **Keyholders** (for example, their Executor), who will gain access to this information after he or she has passed.



MyVault

#### MyVault Storage System

Users can upload important files such as photos, documents, instructions on where to find the Will, etc. The user can then set up Keyholders to access these files once he or she has passed.

## Our Services

### Last Will and Testament

Create a perfect, solicitor-approved legal Will from the comfort of your home.



### Living Will

Specify your health care wishes in case you are ever unable to communicate.



### Expatriate Will

If you live outside of the U.K., or have assets in Canada or U.S.



### Life Locker

Store personal information critical to be passed on to your family and executor.



# How it Works

## Just Click. Print. Sign.

All the user needs to do is click through the steps – we have **online help provided throughout**. Once they're done, all that's left to do is to print the Will and sign.

Need more time? Users can always save their work and come back later.

## Keyholder Advantage

When people pass away, getting their documents to the right people can be a mess. With us, users can name people they trust as Keyholders, who will gain access to their documents (or instructions on where to find them) after the user has passed. **It's free**, and you can learn more [here](#).

Section 4 of 9

### Identify Others to be Included in your Will Tell me more

If there are other people or organizations to be included in your Will, you can name them now. You can also add more names later, as you are working through this wizard.

Full Name:	<input type="text" value="Enter full name"/>
Gender:	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Charity/Org
Relationship:	<input type="text" value="Relationship to you"/>
Address:	<input type="text" value="Enter their address"/>

*After you add the first person, you will have the option of adding more people.*

< BACK SAVE NEXT >

## New Feature for 2016

Handling of **Blended Family Situations**, an issue which affects approximately 12.6% of families.

In these cases, if one leaves his or her entire estate to their second spouse without creating a trust, their children may lose their inheritance.

If a parent has children and then remarries, they must leave their estate in trust to their second spouse, or create a life-interest in the family home in order to protect the inheritance of their children.

Currently LegalWills.co.uk is the only service in the U.K. that adequately handles this situation.

## MOBILE FRIENDLY WEBSITE

59 9:22 AM

Section 7 of 9

### Specify How to Distribute Your Possessions

You are now ready to specify how you wish your possessions to be distributed.

*Remember:*

- To reduce the likelihood of your Will being contested in a court of law, be as complete and unambiguous in your answers as possible.
- While answering the questions, you may click on the Tell me more button which appears on each page to obtain further information.
- You can come back at any time to revise your answers and keep your Will up to date, free of charge.

Click on the "NEXT" button below to continue...

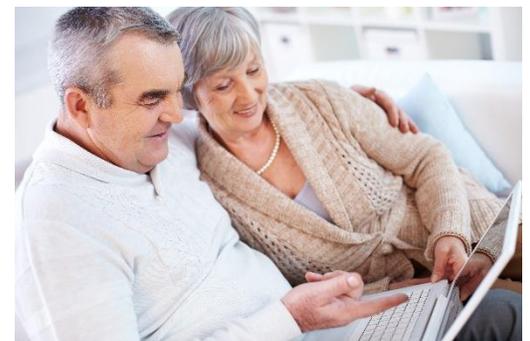
Jump to:

Section 7: Distribute Your Possessions

< BACK SAVE NEXT >

## We make it easy

Users can navigate through our service on their desktop or mobile. Save your progress on one device then go back to it later with another. We make the process simple, as it should be.



## Completely Legal

To become a legal Will, the document must be signed in the presence of two witnesses who are not beneficiaries. There is no legal requirement to use a solicitor to prepare a Will, nor to have it notarised.

Who can write a Will? The law allows anybody to write their own Will as long as they are of sound mind when it is signed. In other words, a solicitor is not necessary.

# Partnership Opportunities

## Opportunity #1 | Link Service

The partner simply refers its clients or users to use LegalWills.co.uk, as an affordable and convenient way of creating their Will.

**How does this work?** All you need to do is include one of our links on your website, that's it!

Once the banner link is on your website, there's absolutely nothing more required from you. All ongoing support is handled by us; there is no incremental cost.

**What would happen from our side?** A custom landing page would be created, where your clients would complete their Will or other documents after clicking on your link.

For every sale, you earn a commission.

Contact information (or profile) of the client, as well as specific areas of interest can be directed back to you.

This option has been taken by **Intuit**, **SimpleTax**, the **Ontario Teachers Union**, the **Canadian Diabetes Association**, and many more.

## Opportunity #2 | Embed Service

This option includes our white label "Embed" service; the ability to embed the complete LegalWills service within an iFrame on your website.

Everything is the same as with Opportunity #1, but the service can now be completed within your own website.

**How does this work?** We will supply you with a string of code to insert into your website - that's it.

Orders and emails are processed by LegalWills.co.uk. Once the initial setup is complete on your end, we'll take care of every transaction for you.

This option has been taken by several financial advisors, insurance brokers, and charity organisations.

## Opportunity #3 | API Service

This option includes our white label API service; a complete stripping out of the LegalWills branding.

**How does this work?** Orders are processed, pricing is established, and emails are generated by the partner.

Services are purchased wholesale by the partner, directly from LegalWills.co.uk.

This allows partners to offer their own estate planning service directly from their website, and determine their own pricing (or make it free).

**What would happen from our side?** This option requires a slightly more technical implementation. Our company would work more closely with yours while we set up the API service. As always, we will be committed to a successful and convenient delivery.

## Commissions & Discounts

**With Opportunity #1-2**, you can earn commissions and offer discounts on any of our services.

**How does this work?** As a partner you will receive 30% of each sale; you can choose how to distribute this between your discount offered and your commission earned.

For example, a partner could offer a 10% discount and then earn a %20 commission (on each sale). In another example, you could choose to put the full 30% towards your commission. It's all up to you.

Partners can also offer discounts above 30%, but must cover the additional discount themselves.

**PARTNERS IN ACTION**

**Canadian Diabetes Association**

Exclusive to Canadian Diabetes Association Supporters!

Prepare your Last Will and Testament with unlimited updates for one year including online storage

**Special Deal**  
\$29.95

Create a Legal Will right now!

\* is required Prefix: (eg. Mr., Ms., Dr.)

Click First Name: Middle Name: Last Name: Suffix: (eg. Jr., Sr.)

Print City/Town: State: Texas Country: United States \*Email Address: Gender: Male Female

Sign Next >>>

## Link Service

Opportunity #1 – The landing page created on our website for The Canadian Diabetes Association.

**SHELTER BAY** Home Life Insurance Health Insurance Employee Benefits Blog 1.888.498.5288

Get a Will

It's easier than ever to prepare your own will from the comfort of your home or office. Get started and check this off your list today.

Instant Life Quotes!

Age: Gender: Sex: No: Province: Coverage Amount: \$500,000 Coverage Length: 20 Years

SET QUOTE

RECENT POSTS

Cornering the Transamerica (WARD) Life Insurance Policy and When Should I do It?

Working as a Life Insurance Broker: considering this rewarding career.

Top Canadian Life Insurance

## Embed Service

Opportunity #2 – Our Will service embedded into the Shelter Bay Financial Corp. website.



## Are there any Costs?

We handle all associated costs. While your organisation can earn a 30% commission on each sale, we do not actually keep the remaining 70%. In most cases, our profit margin is equal to or less than our partners.

Why? We incur all legal, licensing, insurance, infrastructure, customer service, and product development costs. All that's left for you is profit.

# Aggregated Reports

Keeping track of your partnership campaign and receiving your commissions is important. We make it as easy for you as possible.

Your organisation will receive its own Login ID, which you can also create yourself by clicking on our Affiliates tab.

Once you have your Login ID, you will be able to access our Affiliate Services page as shown to the right.

You and anyone from your organisation can login and navigate through your affiliate page.

From there, you can track your total amount of commissions earned, and request payment.

You can also generate several different reports for configurable date ranges (as shown on the right). These include:

- Sales (for Wills and other services purchased)
- Click through rates
- Conversion rates
- Customer contact information, including email addresses
- Email opt in/out settings
- Date of Will creation
- Date of Will payment

Member since: [November 18, 2015](#)    Membership Expires: [Never](#)

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**Affiliate Services:**

  
[MyProfile](#)  
[View >>](#)

  
[MyReferenceCode](#)  
[View >>](#)

  
[MyStatistics](#)  
[View >>](#)

  
[White Label Embed](#)  
[View >>](#)

  
[White Label API](#)  
[View >>](#)

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**Congratulations!** You frequently asked questions about our Affiliate Services

To request a cheque in this amount, please indicate this in your email. Alternatively, we can deposit your payment directly into a PayPal™ account. It costs nothing to set up a PayPal account if you do not already have one.... simply visit <http://PayPal.com> to sign up.

**Sales Reports**

To obtain a sales activity report, specify the date range:

Date Range    Between

and

[View Printable Report](#)
[Download Excel Spreadsheet](#)

Affiliate Sales Activity Report					
Apr 15, 2016 - Aug 31, 2016					
Report generated: Monday, August 15, 2016 10:35:42 AM					
Date	Payment Processor Order #	Customer Name	Customer Email Address	Customer Opted-in to Email Communication?	Date MyWill Last Downloaded
15-Apr-2016 12:02:47 AM	26P712454W648193V			Yes	15-Apr-2016 12:05:32 AM
15-Apr-2016 9:32:55 AM	49467753B5451790X			Yes	15-Apr-2016 9:34:08 AM
15-Apr-2016 10:08:35 AM	8R649251Y9200794L			Yes	
15-Apr-2016 10:50:56 AM	87N365901N627525V			Yes	
15-Apr-2016 11:39:45 AM	2P573808ML735492D			Yes	
15-Apr-2016 1:21:06 PM	36S92638J6853493L			No	
15-Apr-2016 1:47:20 PM	2NU10876EX715504B			Yes	15-Apr-2016 2:24:22 PM
15-Apr-2016 2:14:38 PM	7FA69731BV764290U			Yes	
15-Apr-2016 3:17:51 PM	03P19396A3366233J			Yes	15-Apr-2016 3:19:07 PM
15-Apr-2016 9:36:20 PM	2M0657893A369971K			No	
15-Apr-2016 10:56:26 PM	97R36349ST9199144			Yes	20-Apr-2016 1:13:53 PM
16-Apr-2016 9:16:47 AM	7YK90584KD8584050			No	
16-Apr-2016 10:12:29 AM	48A10335PV434721R			No	16-Apr-2016 10:23:22 AM
16-Apr-2016 1:53:56 PM	3EJ293071J286143A			Yes	
16-Apr-2016 3:33:23 PM	9XR70650C6156722U			Yes	
16-Apr-2016 4:03:05 PM	5TV0140817204972E			Yes	
16-Apr-2016 7:08:57 PM	66324577Y6904294N			Yes	
16-Apr-2016 7:25:09 PM	53M24081XE837012S			No	16-Apr-2016 7:30:36 PM
16-Apr-2016 9:12:19 PM	17X05761PV275663H			No	
16-Apr-2016 10:40:36 PM	0A9056716Y127224N			No	
16-Apr-2016 11:55:19 PM	252291395Y8996242			No	
17-Apr-2016 11:36:47 AM	7JS36231XR734405			No	
17-Apr-2016 12:17:57 PM	9XR891143A027842F			Yes	17-Apr-2016 12:25:55 PM
17-Apr-2016 1:53:26 PM	2MS04929U7752471S			No	
17-Apr-2016 1:58:05 PM	0TA31441UJ072164B			Yes	18-Apr-2016 9:49:23 AM
17-Apr-2016 2:04:27 PM	9X365615WT099074F			Yes	
17-Apr-2016 5:11:08 PM	4J204245EB7862459			Yes	21-Apr-2016 9:49:46 PM
17-Apr-2016 6:00:04 PM	9K193344U9718410S			No	
17-Apr-2016 8:48:39 PM	24P01320L3916222K			No	
17-Apr-2016 9:03:33 PM	5N734905M7730892N			Yes	
17-Apr-2016 11:54:40 PM	0EW8803HT236252W			Yes	8-Jun-2016 12:26:36 AM
18-Apr-2016 11:17:11 AM	0HW18355G5882844C			No	
18-Apr-2016 1:10:15 PM	3EU41255NR7219535			Yes	18-Apr-2016 1:29:47 PM
18-Apr-2016 1:13:32 PM	80D61657S5555804T			Yes	
18-Apr-2016 1:51:34 PM	0WX82400XK3010935			No	

# Customer Testimonials

**It's our responsibility to make sure your customers are satisfied, and with a 99% satisfaction rate, you can expect them to be.**

"It got the job done faster and easier than when we tried (and were prepared to pay for) a solicitor, who made it a really difficult process."

*"Very easy to use!"*

"Fantastic site! It's great being able to make my wishes accessible online for my family."

"After the awesome customer service I got today, I feel confident that I made the right choice in making this purchase, and if I have any other questions or issues, I know I will receive help readily."

*"What service!!! Wish other websites could learn from you. Thanks very much for everything."*

*"Great site – I referred my parents and I'm an attorney!"*

"Easy, fast and economical. Helped relieve stress and anxiety about getting this major life project completed"

*"I did have some questions about things and I was amazed at how fast my questions were answered."*

"Price was very reasonable and saved me thousands; easy to understand; great customer service; good follow-ups to check that I was doing okay with my process (they cared); ..."

*"Made something difficult that much easier."*

"I liked the convenience and felt safe traveling knowing my assets would go to my kids if something happened to me."



"Very straight forward and easy to use. [All documents] were recognised without issue by all concerned."

*"User friendly, great options in the burial section, very thorough, highly recommend."*

## Satisfaction Guarantee

We constantly maintain a Google Reviews rating of 4+ stars out of 5.

In a customer satisfaction survey, over 99% of respondents answered to being satisfied with our service.

We offer a 30-day money back guarantee – if a customer isn't satisfied, we'll reimburse them the full price.



**We are the #1 Online Will Provider for a reason:**

We provide trusted and proven quality service, offer the most comprehensive options on the market, and care about every person and partner that we work with.

# Start Working with Us Today

## It's never been easier to offer your own estate planning service.

Within a matter of days, you can go from offering no estate planning service at all, to providing the best that there is.

**To get started**, just send us an e-mail (see the contact information below) telling us which Partnership Opportunity you'd like to choose. We'll give you everything you need to set up your affiliate account and connect our service to your website.

Once everything is set up, you're good to go! If you've chosen our Embed or Link service, you don't even have to put any time towards managing the service. We handle all the nitty-gritty, and you get paid.

### The best part is, it won't cost you a thing.

Take advantage of this offer while it's free and become a partner today – you're only one e-mail away.



#### Our Partnership Opportunities:

- Opportunity #1 – Link Service
- Opportunity #2 – Embed Service
- Opportunity #3 – API Service

## Contact Us



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