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Welcome to Heritage Estate Planning

With over 25 years years of expertise in Law and Financial Planning, our comprehensive estate planning service is tailored to our clients, with professional and high-quality advice that offers you assurance and peace of mind.

Having an up to date will in place is vital to ensure that your money, property and possessions are distributed exactly how you wish after your death and that your loved ones are properly cared for. It can also make the lives of those you have left behind a little less daunting.

We also work with our clients to set up a Lasting Power of Attorney which allows you to appoint people you trust to make decisions about your financial affairs and your health and care if you are unable to due to injury, accident or illness.

We are dedicated to making sure that we deal with all your queries professionally but with the utmost empathy and fully committed to making sure our clients feel cared for when availing our services.

Ally Ilott
Managing Director

“ Not all will writers are the same. In my view Heritage are the best at what they do. ”



About Us

Friendly And Professional Service With A Human Touch



Ally Ilott
Managing Director

I founded Heritage Estate Planning following a successful 22-year career in Financial Planning. I felt that there was a lack of high-quality professional estate planning services for people looking for an alternative to a Solicitor and I am extremely proud of the reputation we have built over the last four years.

As a Financial Advisor, I was very aware that a high proportion of adults do not have wills and Lasting Powers of Attorney in place and felt strongly that I wanted to help change this.

My previous knowledge and experience helps ensure our clients receive high quality advice and guidance with exceptional service personally, delivered by myself, Helen and Daisy.

Part of my role is to build and develop strong relationships with professional partners, such as Financial Advisors, Mortgage Brokers and Accountants.

It is vitally important to me that at Heritage Estate Planning we prioritise the trust and confidence our clients place in us when it comes to their estate needs. Our unwavering commitment to staying informed and up-to-date ensures that we provide expert guidance and support. As a proud full member of the Society of Trust and Estate Practitioners (STEP), the leading authority in Estate Planning excellence, I hold the esteemed STEP diploma qualification. Rest assured, our team is equipped with the knowledge and expertise to meet all your estate requirements.

I live at home in Newbury with my three children and have an older daughter who lives in Copenhagen. I love running, listening to music, especially live and socialising.



Daisy Sennett
Administrative Assistant

I joined the company in 2022 and started my role as admin! After a waitressing job, this was a big career change, but I am positively embracing my role in Heritage and thoroughly enjoy working in a close-knit business, that feels like we are all striving to the same main goal of growing this business and helping people through their journey of life.

I am very proud to be a part of such a caring company that goes above and beyond to help our clients.

I look forward to progressing more into this company and leaning more along the way!

I love reading and socialising in my free time!



Helen Davies
Estate Planning Consultant

Having taken voluntary redundancy from a corporate company I had worked with for over 25 years, I was fortunate to be given the opportunity to work alongside Heritage Estate Planning as a Consultant based in the Southeast of England.

My previous experience of customer service makes this position ideal for me as my aim is to always strive to provide a first-class service to my clients.

I do that by carrying out free initial discussions where we discuss key roles, current family situations and look further than the obvious when it comes to the distribution of the estate.

Once the clients are happy to proceed, we arrange either a face to face or video conference meeting for me to take their full instructions. I take pride in ensuring I am there to fully explore potential issues and work with my clients to provide personalised plans.

I also talk through the "here and now" and organise Lasting Power of Attorney for both Health & Wealth, ensuring complete peace of mind both now and in the future.

I live in Kent and am married with one stepdaughter. I enjoy spending time with my family, socialising with friends and have found a new passion for health & fitness. I love holidays abroad where I can explore new places and enjoy some rest and relaxation.



Vision and Values

Our vision is to provide peace of mind to our clients and their families for generations to come.

Our values run through the core of everything we do. We offer:

- Integrity
- Trust
- Empathy
- Professional expertise
- Long-lasting Relationships

Our Services

We are dedicated to providing a professional experience with a personal touch, so that you know that you are in expert hands. We value the relationships and trust we build with our clients and always take time to listen to your requirements and concerns.

We offer the flexibility of one-to-one meetings in either person or via video conferencing and take the time to understand all your personal circumstances and requirements.

Our services include:

- Wills
- Lasting Powers of Attorney (LPA)
- Probate- in partnership with Premier
- Trusts
- Change of property ownership



All our services are high quality and competitively priced, ensuring you receive a reliable and professional service at a cost that is affordable.

Making a Will

The majority of the UK population does not have a will. Yet creating a will is one of the simplest and most important steps you can take to protect your family's future.

With flexible meeting options of home visits or via video conference, we offer you a completely free, no-obligation consultation where we discuss your wishes and answer all your questions.

We work closely with our clients to ensure that we consider all your requirements so that the process is as collaborative as possible.

Your will is prepared by our own legal team who are available to discuss any concerns you have and provide advice and guidance.

Once you have approved and signed the final version of your will, we discuss how you would like it to be stored and notify your chosen executors of their appointment under your will.

For peace of mind and security, our recommended partner for storing your will is 'The National Will Safe', where your will is registered on the national database.

We also offer a free amendment service on all the wills we write, so that you can adapt with your circumstances.

“I have been putting off making a will for a long time being frightened and worried by all the legal jargon and stressed by the reality of it. I would totally recommend Heritage Estate Planning to anyone looking to get this important task done.”



“ This was such an empowering opportunity to be very clear about what instructions I wanted to include. As someone who values their quality of life, I felt immense relief at being able to include that declaration in a legal document. ”

Lasting Powers of Attorney

Having Lasting Powers of Attorney in place is another important form of forward-planning that can make life a little easier for you and your loved ones, in respect to your health and finances.

If you become unable to make decisions with regard to your health or finances, due to a decline in your mental or physical health or if you simply want to share the burden of such decisions, carefully chosen attorneys (usually friends or family members) can step in and make these decisions on your behalf.

Crucially, it is only while you have sufficient mental capacity to make these decisions that you can put Lasting Powers of Attorney in place.

Unfortunately, most people do not have Lasting Powers of Attorney as they leave it too late to arrange them, taking the view that it is something that only needs to be done by the elderly or infirm.

When preparing Lasting Powers of Attorney documents on your behalf, we gather all the information needed for our legal team to prepare the Lasting Power of Attorney forms for you and register them for use with the Office of the Public Guardian.

Probate

Probate is a legal process which takes place after someone dies. It can be a time-consuming and stressful experience for an Executor at a time of grief and loss in their lives.

Heritage Estate Planning's expert team can offer you support and peace of mind by dealing with some or all of the process on your behalf.

To obtain the Grant of Probate, we correspond with the Probate Registry, complete an inheritance tax return and acquire an Oath for Executors to arrange for its issue.

Once that is issued and received, you are then required to deal with the remaining aspects of the estate administration.

“Ally helps clients every step of the way without any hard sell or scare tactics. ”





Probate Estate Administration

If you would like us to deal with the entire Probate process on your behalf, we:

- Notify banks, building societies, investment companies and liabilities in estate of the death;
- Complete a valuation of the estate listing all assets and liabilities;
- Submit inheritance tax and Oath of Executors to obtain Grant of Probate;
- Calculate inheritance tax and liability and arrange payments;
- Arrange for accounts and investments to be closed;
- Settle outstanding liabilities and make interim distributions to beneficiaries, where funds allow;
- Ensure that after property sale (where applicable) all final utility bills are settled;
- When all assets have been collected and liabilities paid, we complete final Estate Accounts for the executors to approve and make final distributions to the beneficiaries.

Trusts

Many of our clients may benefit from a Trust to complement their other estate planning documents. The services we offer range from simple Life Interest Trusts within a will, to Trust set up within a client's lifetime.

Providing bespoke and accurate advice on the subject of Trusts, we proudly draw on the experience of our expert panel of solicitors for their advice and guidance on the documentation involved in setting up a Trust.

“People do not realise the importance of having proper provisions in place – or the potential dire consequences of not having the right measures put in place. Ally ensures all her clients are in safe hands.”



Peace of mind that you've
planned for the future

Get in Touch

Please contact us if you would like to arrange an appointment to make a will and/or Lasting Powers of Attorney.

T 01635 33733
info@heritageestateplanning.co.uk
heritageestateplanning.co.uk

We deal with your enquiry in a sensitive, confidential and professional manner and endeavour to make the process of making your will and/or Lasting Power of Attorney as simple as possible.

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