



Our Legal Guidance Service

Information for legal professionals

We're here to help

This booklet is a step-by-step guide to our **Legal Guidance Service**.

If you have any questions or comments, please contact your legacy partnership manager directly or email **LPMs@cancer.org.uk**

For more information visit **cruk.org/legalguidance**

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About the service

Q What is Cancer Research UK's Legal Guidance Service?

Our Legal Guidance Service is designed to help our supporters with the financial and legal administration involved in putting their affairs in order. They'll receive some initial advice from our solicitor partners and then have access to a number of legal services in one place at a discounted cost, as we'll contribute to the fee.

Q Why is Cancer Research UK helping with legal and financial planning?

People can face real uncertainty and be overwhelmed by the legal administration that comes with proactive end-of-life planning. By offering a comprehensive selection of legal services in collaboration with our legal partners, we hope to help our supporters take control and save them time, effort and money.

Q Who should legal professionals offer this service to?

The service is designed for people who are planning for end of life and would benefit from services beyond a simple Will, and who have expressed an interest in leaving a gift to Cancer Research UK.

Q What's the opportunity for your firm?

Our Legal Guidance Service provides an opportunity for your firm to leverage the brand status of Cancer Research UK and engage with clients in a new way. It has a more flexible pricing model than our Will-Writing Service, giving your firm greater control over service rates. What's more, you'll be helping to provide much-needed support to people in your local community.

Legal Guidance Service steps



A supporter who is considering how to move forward with end-of-life planning hears about our Legal Guidance Service through our recruitment channels. Find out more on page 5.



They contact a Legal Guidance Service provider to book an initial free consultation. Find out more on page 5.



They share their needs and circumstances with the solicitor during the initial consultation.



The solicitor produces a tailored plan for the supporter detailing the services they require. Find out more about the services we offer on page 6.



The services are agreed with the supporter.



The services are delivered to the supporter.



The solicitor completes and submits an online Legal Guidance Service form on receipt of the signed Will to share with Cancer Research UK the supporter information, the services delivered, the gift amount and their invoice. Complete the form at cruk.org/legalguidanceform



Our finance team process the invoice and pay our contribution towards the solicitor fees.



We may gather feedback from the supporter if they choose to be contacted.

Getting clients onboard

We use **two main recruitment channels** for our Legal Guidance Service:

- 1. Our legacy relationship managers:** This regional team is public-facing and regularly comes into contact with supporters. They help identify anyone who is in need of legal support for their end-of-life planning, and who is interested in leaving a gift to Cancer Research UK, and signpost them to a Legal Guidance Service provider.
- 2. Your firm:** During the normal course of meeting with your clients, you may identify someone who is planning their end-of-life affairs and interested in leaving a gift to Cancer Research UK.

Initial client consultation

The first step of using our Legal Guidance Service is an **initial free consultation** to allow the solicitor to understand the supporter's circumstances and put together a tailored plan of services required, based on the supporter's individual needs.

We have made sure the parameters of this free consultation are clearly defined in the supporter T&Cs. Legal Guidance Service solicitors will be permitted to charge supporters for their time and advice given outside of these parameters.



Services included

We'll contribute towards the following core services:

- ✓ **Will-writing/codicils** (mandatory when using our Legal Guidance Service)
- ✓ **Power of attorney** (all types)
- ✓ **Letter of wishes**
- ✓ **Legal lifetime planning**
- ✓ **Living Wills**

Your additional services

Outside of these core services, your firm may offer other services that would be useful for our supporters. These should be offered, but it should be made clear that we will not contribute towards them. These may include:

- ✓ **Conveyancing**
- ✓ **Employment law**
- ✓ **Personal injury**
- ✓ **Family law**
- ✓ **Corporate law**
- ✓ **Medical/clinical negligence**
- ✓ **Dispute resolution**
- ✓ **Any other service relevant to end-of-life planning**

Signposted services

You may also want to signpost the supporter to services offered by other providers, again making it clear that we will not contribute towards them. These include:

- ✓ Financial planning
- ✓ Bereavement support
- ✓ Counselling
- ✓ Funeral planning



Your feedback

We'll capture the demand for additional services through our online pledge form, as well as through feedback from supporters, to help inform the core services we offer.



Payment

We'll pay for:

- The cost of a simple single or mirror Will: **£144/£204 (incl. VAT)**
Alternatively, the cost of a single or mirror codicil: **£72/£108 (incl. VAT)**
- **Up to £500 (incl. VAT)** off the total bill of any of the previously outlined core services delivered to the supporter.

We have chosen this payment model for a number of reasons:

- The fixed cost is easily manageable.
- The £500 discount can be applied to multiple combinations of services, aligning to our objective of providing a tailored service.
- The model allows for firms to set their own rates for services outside our Will-Writing Service.



Patrick and Sue have chosen to leave a gift in their Wills

Payment examples

Example A

Services delivered:

Simple mirror Will: £204
1 x lasting power of attorney
(LPA) document: £400
Registration of LPA: £82
Declaration of trust: £200

Total: £886

Cancer Research UK pays for:

Simple mirror Will: £204
£500 off total core services
bill (as exceeds £500)

Total: £704

Supporter pays for:

Remainder of core
services bill: £182

Total: £182

Example B

Services delivered:

Simple single Will: £144
1x LPA document: £400
Registration of LPA: £82
Employment advice: £300

Total: £926

Cancer Research UK pays for:

Simple single Will: £144
£482 towards core services
(doesn't exceed £500)

Total: £626

Supporter pays for:

Employment advice: £300

Total: £300

Example C

Services delivered:

Simple mirror Will: £204
2 x LPA document: £800
2 x Registration of LPA: £164
Conveyancing: £850

Total: £2,018

Cancer Research UK pays for:

Simple mirror Will: £204
£500 off total core services
bill (as exceeds £500)

Total: £704

Supporter pays for:

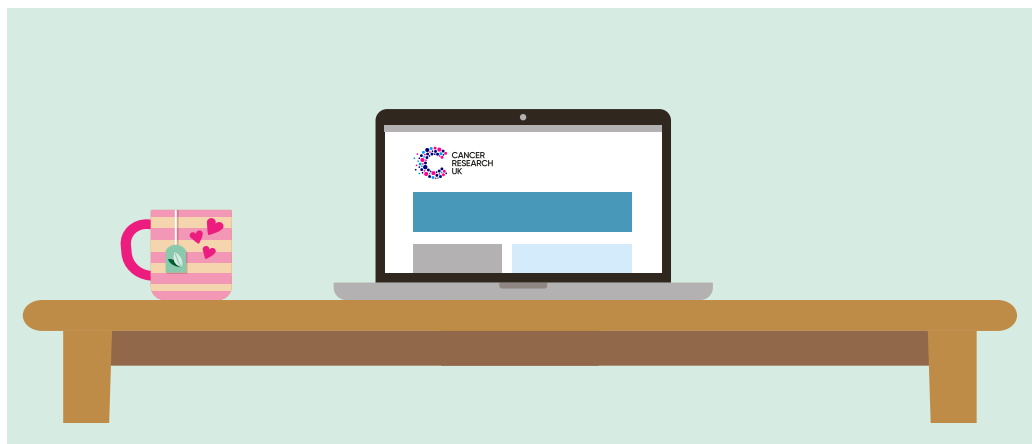
Remainder of core
services bill: £464
Conveyancing: £850

Total: £1,314

Your responsibilities as a Legal Guidance Service provider

We expect all solicitors using our Legal Guidance Service to:

- Offer a free consultation with prospective service users to understand their needs and suggest services they could benefit from, based on their individual circumstances.
- Submit an online Legal Guidance Service form for each supporter who uses the service, sharing supporter details, information on services delivered, pledged gifts and an invoice. Find the form online at **cruk.org/legalguidanceform**
- Ensure the online form and invoice is submitted as soon as you are in receipt of a signed Will and all other services are complete. There is no need to fill out a separate Will-Writing Service online form.
- Attend a short training session delivered by our legacy partnership managers, along with yearly review meetings to discuss the performance of the service.
- Commit to providing feedback to Cancer Research UK about your use and delivery of the service.





The support we offer



Online and offline information materials to aid conversations with prospective supporters.



Training for solicitors in your firm who will be providing our Legal Guidance Service. This training will be delivered by your legacy partnership manager and will include content to help support conversations with supporters. We'll also run through the processes involved in delivering the service.



A dedicated legacy partnership manager to answer your questions about the service.

To get in touch with the team, email
LPMs@cancer.org.uk or call **020 3469 8797**

Thank you for your support.

Together we are
beating cancer

Thank you for helping us create life-saving legacies

cruk.org/legalguidance

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