

Working in partnership

Estate administration services to support your clients and grow your business



Kings Court Trust

The estate administration people

We are the estate administration people.

**This booklet tells you everything you need
to know about Kings Court Trust and how we
work with our business partners.**

Handled with care

**We only do one thing: estate administration.
And from the simplest estate through to
multi-million pound legacies, we're proud
to say we do it really well.**

We are one of the UK's leading estate administration specialists, having distributed over £1 billion in inheritance. It's a considerable amount, but there's a family - your clients - behind every single estate. So we handle every estate with the utmost care.

We know how much estate administration matters and we make sure we get it right – for you and your clients. And that's one of the reasons why 9/10 of our customers recommend us. Take a look at our independent reviews at kctrust.co.uk to see how highly we're rated.

Read on for more information about how we can support your clients and help you to grow your business.



Supporting your clients. Growing your business.

We work with businesses like yours to develop mutually beneficial partnerships. We want us both to achieve our goals by providing a range of services that support your clients and help you to grow your business.

- Our unique partnership options allow you to choose how you work with us, whether that is by referring clients to us or handling all aspects of the sales process yourself
- Your clients can call us on 0300 303 9000 for practical support and guidance on how to deal with the loss of a loved one – our team of specialists will explain what needs to be done clearly but empathetically
- We will pay you a highly competitive fee share when your clients appoint us to provide an estate administration service
- We will store your clients' important documents – including Wills, LPAs and deeds - in our secure storage facility completely free of charge, allowing you to offer an additional service to your clients
- You will have access to Insight, our online case tracking tool that allows you to follow the progress of your clients' cases, submit leads, upload important documents and view fee share information
- We will keep you informed of how your clients' cases are progressing throughout the process and will contact you at key milestones so that you are always kept informed
- We will refer any beneficiaries back to you in order to help you expand your client base and grow your business
- We will provide you with free marketing support, content and literature so that you can promote our services to your clients
- You will be invited to exclusive business partner events and seminars to help you develop your professional knowledge and gain CPD hours
- You will have a dedicated regional sales manager as a point of contact who can answer questions, provide advice and help you support your clients

Estate administration is all we do

Administering estates is what we specialise in all day, every day. We've got the systems and the team in place to keep your clients' cases moving forward and we're committed to distributing the assets as quickly as possible.

- Our fully inclusive, fixed price service makes administering the estate as straightforward as possible
- Free, impartial and practical advice on what to do when someone dies so that they understand their options and can make an informed decision with confidence
- A market leading estate administration service that removes the stress, effort and legal liability of dealing with a potentially complicated legal process themselves
- A fixed price service so that they know exactly what they will pay up front and don't have the uncertainty of hourly rates or additional fees to consider
- Regular updates on how their case is being managed and the opportunity to track progress at any time thanks to Insight, our exclusive online case monitoring system
- A main point of contact who they can contact directly by phone or email 8am to 7pm, Monday – Thursday (8am to 5.30pm on Fridays)



"Everything went through very quickly and efficiently. Could not fault the service. Would highly recommend Kings Court Trust."

Take a look at our independent reviews at kctrust.co.uk to see how highly we're rated.

A solution for every type of business

We understand that every business is different. Whether you are a sole trader working within your local area or a growing organisation with staff across the country, we can support your clients in the most appropriate way for you.

Bronze partnership

A quick and simple way of referring clients to an estate administration specialist.

- Refer clients to us quickly and easily by phone, email or online
- Little or no extra work required
- Earn a competitive fee share on all successful referrals

As a bronze partner, you can refer your clients directly to Kings Court Trust. We will then take responsibility for managing that lead through our sales process.

You can choose to refer your clients to us in a number of ways – via Insight, by phone or by email. We will keep you updated so you're always in the loop.

Silver partnership

Add value to your services, generate additional revenue and retain control of your client relationships.

- Full training and support so you can sell our estate administration service to your clients
- Retain full control of the sales process and your client relationships to maximise conversions and increase revenue
- Earn an enhanced fee share on all successful referrals

As a silver partner, we provide the tools and training you need to sell our estate administration service directly to your clients. This unique approach allows you to offer a market-leading estate administration service as part of your existing client proposition, while retaining control of your client relationships.

We will train you and your staff so that you can discuss our estate administration service with confidence as part of your existing client conversations. We will give you access to our exclusive software that will enable you to provide a competitive quote face-to-face or over the phone.

Gold partnership

A completely integrated estate administration service to enhance your customer proposition

- Benefit from a comprehensive training programme so that you can sell our estate administration service and complete the fact find process
- Retain control of your client relationship throughout the process and develop relationships with beneficiaries for future business development opportunities
- Earn our highest fee share on all successful referrals

As a gold partner, you will benefit from a comprehensive training programme so that you can sell our estate administration service directly to your clients.

We will also equip you to undertake a fact find meeting with the client so that all of the information we require to administer the estate can be collected without the need to involve any third party.

At this point, you would refer the client and relevant information to Kings Court Trust so that we can begin the legal process of administering the estate.

The sales journey

Death notification Family meeting Fact find

Bronze



Bronze partners refer details to Kings Court Trust after receiving a notification of death. Kings Court Trust will conduct the family meeting and fact find.

Silver



Silver partners conduct the family meeting and close the sale on behalf of Kings Court Trust. Kings Court Trust will conduct the fact find.

Gold



Gold partners conduct the family meeting, close the sale and conduct the fact find on behalf of Kings Court Trust.

Additional services to support our partners



Secure, professional document storage solutions

Kings Court Trust securely stores over 100,000 legal documents on behalf of our business partners.

All the Wills we store can be registered with Certainty, the national Will register, at no cost. This means that you and your clients have the peace of mind of knowing that any documents stored with us are also recorded on the UK's most commonly used Will search service.

In the case that the family of the deceased doesn't know where the Will is located, a search of the Certainty database would identify Kings Court Trust as the registered holder.



Professional executor services from a specialist

One of the many ways in which we can support you and your clients is through our free, professional executor service. This can offer peace of mind to testators who, for whatever reason, decide against appointing family members as an executor.

There is no initial charge for appointing us as a sole or joint executor. Our fee for acting as executor will be agreed, fixed and charged to the estate at the time we commence our executor duties.

Where Kings Court Trust is appointed executor of a Will, either sole or joint, we will give favourable consideration to renouncing our appointment upon request, provided we are satisfied that suitable alternative arrangements are in place and the interests of the beneficiaries are not compromised. There is no charge if we are asked to renounce.



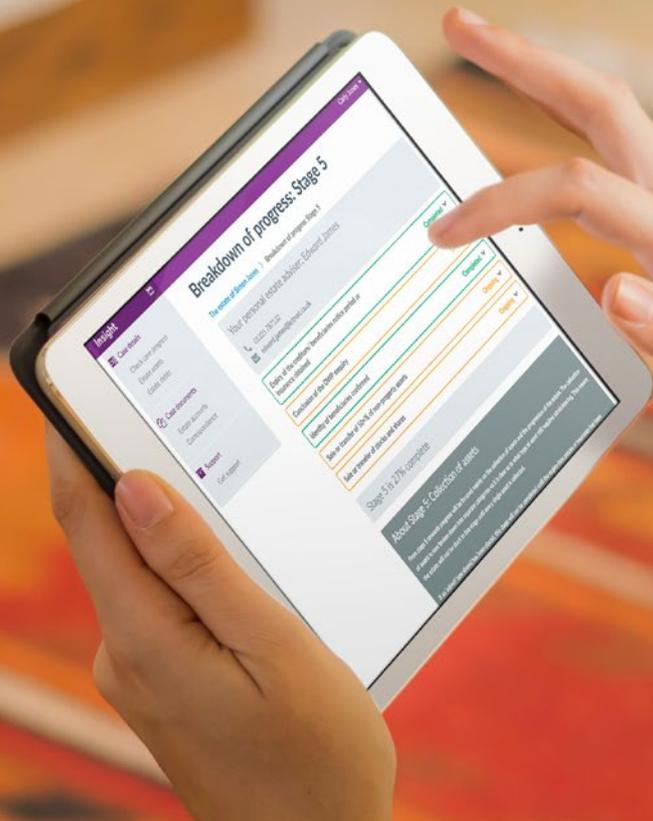
Access to free CPD content, webinars and events

We run regular CPD webinars and events across the country for our business partners.

These events offer a range of benefits, including:

- Technical updates and training opportunities
- Presentations from external speakers
- Networking opportunities with likeminded professionals
- CPD hours that can be counted towards your own professional development

Personal service. Online access.



Make referrals and check progress using our online case tracker, Insight.

While we embrace technology, we're not bound by it. So for queries and advice, just pick up the phone to your client's main point of contact.

We look forward to working with you

At Kings Court Trust, we occupy a unique, privileged position. We are called upon at a sensitive time when families are still going through the stages of grief, but there is an acceptance that certain realities need to be addressed.

What can interrupt this healing process? Unnecessary stress. Anxiety. Unexpected obstacles. A gruelling or difficult estate administration experience.

We do everything in our power to make sure that this doesn't happen to the families that entrust us to take care of their estate administration.



Tom Curran
CEO,
Kings Court Trust

We carry out our service professionally, proactively and properly. We pride ourselves on reducing stress and anxiety for families, we keep them informed and we go the extra mile.

This is our philosophical and inspirational heartbeat and it informs everything we do at Kings Court Trust. Every action, decision and service we offer should go some way to achieving our purpose - helping families to move on.

A vital part of achieving this goal is our growing, nationwide partner network. We look forward to working with you.

**Join our nationwide
partnership network.
We'll support your clients
and help grow your business.**

**For more information about working with us,
call us on 0300 303 9000.**

Call us today for more information

We can talk you through our partnership options.

 0300 303 9000

 kctrust.co.uk/partners

 partners@kctrust.co.uk

