octopuslegacy

Help your clients plan for death and find support after a loss

Our Service

01

Probate services

02

Estate planning consultations

03

Lasting Power of Attorney (LPA) services

04

Will writing services - from complex wills with a solicitor to simple wills online

05

Our **partner dashboards** give IFAs visibility over clients' beneficiaries & plans for their assets

Why it matters

21%

Of all assets are lost annually due to not continuing relationships with beneficiaries

20%

On average IFAs have a relationship with only 20% of beneficiaries

85%

Of younger adults don't have a financial advisor

Data Source:
Online survey from Opinium Research in partnership with Octopus Investments, 10th December 2018

Why work with us

Get oversight of all the assets & beneficiaries via the will: allowing you to build relationships with younger generations.

Retain management of assets even after clients lose mental capacity through LPAs.

Maintain relationships and funds after clients die through a collaborative Probate process.

The benefit to your clients

A key part of 360 financial planning: Helping to ensure that tax efficient planning is properly implemented.

Saves them at least 35 hrs of work at an already overwhelming time, so they can focus on what matters.

Their **financial wishes are protected** even if they lose capacity.

Octopus Legacy is a proud part of the Octopus Group

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To access our services clients can book in a free estate planning consultation:

will.octopuslegacy.com/estate-planning

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