

Richard - July 2024 - Your Copy Of The BTWC Newsletter

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BTWC Monthly Insights - July 2024



The July BTWC Newsletter

Welcome to the BTWC Monthly Insights Newsletter for July. It's been quite the month for sport with Wimbledon and the 2024 Euros now consigned to history.

But there's still plenty to look forward to for sporting fans with the Paris Olympics to boost sporting morale! Have you had any big wins this month?

July has been a busy month here at BTWC HQ with lots of adviser and client queries to answer. You'll also read below that we are re-launching our Members Area on the website with new resources and information to support you with your client conversations..

We've also got lots more interesting nuggets to share with you so enjoy this months newsletter!

P.S Tuesday 6th August is our next Quarterly BTWC Update session so scroll down to register and save the date in your diary.

BTWC Member Zone

The Member Zone has had a revamp!

The Member Zone on the BTWC website has had a long overdue update which we're sure you'll all find extremely useful. Exclusively for registered BTWC Associates, not only can you download instruction forms and other key documents but you'll also find lots of useful resources to support your business. We've added updated client product guides, video content, marketing resources and more.

For Associates already using the member area, you can use your usual login credentials. If you don't currently have access, just email enquiries@btwc.co.uk and one of the team will get you up and running.

[Click Here - BTWC Member Zone](#)

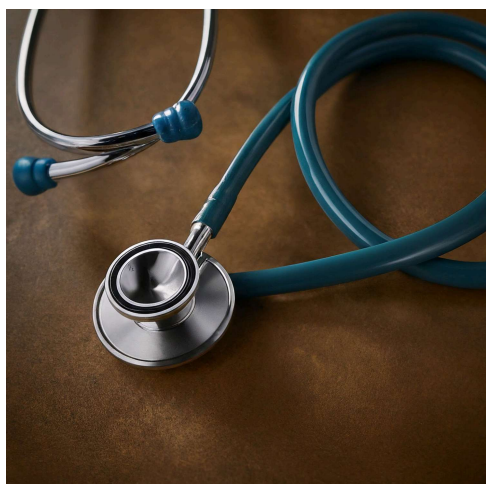
Post of The Month

Health & Welfare LPA V's Advanced Directives

Both of these legal instruments can ensure that wishes regarding medical treatment and personal care are respected and followed in the event of incapacitation. But what's the difference between the two and how can you assist your client to make the right decision for them?

Read the blog post to find out more.

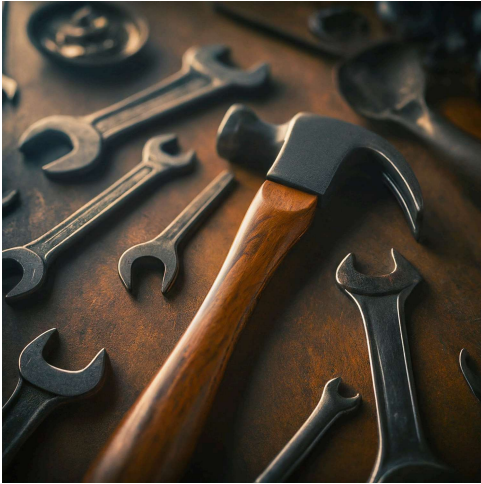
[Read More](#)



Tools you need to provide Estate Planning Services

Now you've decided to provide Estate Planning services to your clients, it may feel difficult to know where to start and in this blog we explore the core elements you need to set your course and deliver effective legacy solutions.

[Read More](#)



"Ask The Experts"

"What is a forfeiture clause in a Will?"

A non-contest or forfeiture clause can be included in a Will to try and avoid a challenge on the testator's death. These clauses leave a specified gift to a beneficiary on the condition that they refrain from bringing a claim against the estate. If they fail to comply with the condition, the gift to the beneficiary is revoked and they receive nothing pursuant to the terms of the Will.

However, do keep in mind that a claim could still be brought to the court for 'reasonable financial provision' (*Sim v Pimlott 2023*). Too small a gift, and the beneficiary may take their chances and/or the gift may be considered unreasonable provision.



Quarterly Update - August 2024

Save the date - Tuesday 6th August 2024 - 10:30am

Our next Advisor Quarterly Update is scheduled for Tuesday 6th August. You can expect to cover technical updates, case law reports and a guest speaker so make a note in your diary.

[Register Now](#)

Want To Work With Us?

We have limited opportunities available for introducers and advisers to work with us – could you be a good match for us?

If you're looking to develop your own estate planning business or simply introduce clients to a reliable Will Writing service Contact Us and lets arrange a chat.

[Schedule a Call](#)



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