



Beneficiary Protection Plan Process

Optional pre-sales support, client facing webinars, email your Client Overview Form



support@solidustrusts.co.uk

Download Application Form from Solidus website and complete with client details



<https://www.siep.co.uk>

Have Application Form signed by adviser and client, or email your client's authorisation



applications@solidustrusts.co.uk

Pay invoice by bank transfer

Solidus review application, request additional information if required and raise invoice

Solidus post drafts to clients for approval with copies emailed to Adviser for reference

Clients post drafts back to Solidus to confirm approved subject to any amendments noted

Solidus complete final drafting and Trusts approved by legal partners

Adviser to confirm to Solidus how signing of final documents will be arranged

Solidus print final documents and post Trusts to Trustees to obtain their signatures if required

Final documents for signing sent to Adviser

Meet with clients (and Trustees if required) to arrange document signing

Return all documents to Solidus for verification and binding of Wills

If you want Solidus to do HMRC Trust Registration, email scanned copies



registrations@solidustrusts.co.uk

Solidus process original documents and submit Land Registry forms if applicable

Solidus store original documents if required & send Binder of copy documents and advice to clients

Each stage of the process is emailed to you and can be viewed in Trustworks
Set the client expectation for 12-14 weeks from case submission until final documents are ready for signing