SOLIDUS

Solidus Plan Process

Optional pre-sales support, client facing webinars, email your Client Overview Form → support@solidustrusts.co.uk

Solidus will suggest planning approach

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 via BACS once received

Each stage of the process is emailed to you and can be viewed in Trustworks

Liaise with client to approve case summary and email confirmation

Solidus review the case and develop/confirm the advice

Information Quality Document, draft Wills and draft Letters of Wishes sent to clients and adviser

Clients return draft pack to Solidus

Solidus draft final documentation

Draft documents sent to legal partners for verification

Settle any outstanding balance and arrange signing meeting

Solidus contact adviser for signing instructions (Trustees and clients)

Solidus print & send final documentation (postal signatures are arranged in advance if required)

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

Solidus verify original documents and complete any Land Registry requirements

Return all documents to Solidus for verification

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

Set the client expectation for 16-18 weeks from case submission until final documents are ready for signing