



Contracts at a Glance

For more information please contact us:

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 www.countrywidepartners.co.uk



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Contract A

Trading as a “representative” of Countrywide Tax & Trust Corporation Ltd, Contract A mostly appeals to those who are entirely new to the Will & Estate Planning business and are sole traders.

Contract B

Suitable for those Smaller Companies and Sole Traders who currently trade without any Estate Planning brand of their own and who want to carry Countrywide’s branding on all their documents and business literature.

Contract C

Owing to its flexibility, this is our most popular Contract with our larger Companies and Networks and those Advisors who have their own brand name and who want to be able to choose whether to benefit from working “in association with Countrywide Tax & Trust Corporation Ltd”.

Contract D

Contract D is in essence an “Execution Only” contract and is suitable for those Advisors who are experienced and have their own long established Estate Planning brand in the market place and to stand alone whilst also able to take full advantage of our products and services and the Will writing Software.

Taking Payment

All client payments are made to CTTC Ltd with the commission element paid to your business once funds have cleared and the cooling off period has elapsed.

All client payments are paid into your own business and you pay CTTC Ltd for processing costs only.

All client payments are paid into your own business and you pay CTTC Ltd only for any processing costs.

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VAT

VAT must be charged on both the cost of the products and services and the commission element.

You will need to pay VAT to CTTC Ltd on all processing costs but you will only need to charge the client VAT on your own fees if your business is VAT registered (based on your turn over).

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Professional Indemnity Insurance

You will automatically be covered under Countrywide’s own P.I Policy.

You will be required to take out Satellite P.I cover through Countrywide’s master policy at greatly reduced rates. The cost of this is determined by your anticipated turn over.

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You will be required to take out P.I / maintain any existing cover you already have. P.I cover is available to you to purchase under Countrywide’s master policy at greatly reduced rates. The cost of this is determined by your anticipated turn over.

Drafting Documents

You are NOT permitted to draft your own legal documents. All instructions must be sent to CTTC Ltd for processing and will include a processing fee.

You are permitted to draft your own legal documents when you purchase the relevant package. This means a huge saving on processing fees.

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Contract A

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Contract C

Contract D

Data Protection

You are required to register your own business with the ICO for Data Protection.

Under Contract A, CTTC are the Controller of personal information and NOT the Advisor. This means that you would NOT be permitted to retain ANY information in relation to the client. Should you wish to retain their information you will need to select this option in your Contract at outset. You will need to obtain the client's CONSENT to do so and are required to be FULLY GDPR compliant.

You are required to register your own business with the ICO for Data Protection.

As a Controller of personal information, you MUST be FULLY GDPR compliant.

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Software Packages

You are permitted to purchase the Essential Software package ONLY.

You are permitted to purchase the Professional Bundle package ONLY.

In addition to purchasing the Essentials package you can opt to add on any of our range of Software packages.

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STEP Will Writing Code

You must adhere to the STEP Will writing code of practice.

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You will not be permitted to make any reference to the STEP Will writing code of practice unless you are authorised to do so in your own right as a T.E.P.

Branding

All legal documents, paperwork, marketing materials must ONLY carry CTTC Ltd's own logo & branding.

All legal documents, paperwork, marketing materials must ONLY carry CTTC Ltd's own logo & branding where we draft the documents with the exception of the client receipt which should carry your own details.

All legal documents, paperwork, marketing materials have the option to carry your own Company brand or work "in association with CTTC Ltd".

All legal documents, paperwork, marketing materials must carry ONLY your own Company brand and NO reference to CTTC Ltd should be made.

Selling Legal Products & Services

You are not permitted to recommend or sell any other Company's products/services where CTTC Ltd provides them.

You are not permitted to recommend or sell any other Company's products/services where CTTC Ltd provides them unless drafted at CTTC Ltd Software.

You are not permitted to recommend or sell any other Company's products/services where CTTC Ltd provides them unless drafted at CTTC Ltd Software.

There are NO restrictions on the legal products & services you are permitted to recommend or sell.