



LegalWills

You DECIDE. ®

MEDIA KIT

legalwills.ca/media • media@legalwills.ca



 **About LegalWills** 



OUR STORY

Founded in 2000 by Tim Hewson and Henry Raud, former colleagues at a large tech company, Canadian company LegalWills has become a global leader in online estate planning services. Henry, Tim, and a group of colleagues had a tradition of Friday after-work drinks. One Friday, the topic of Wills came up when a colleague mentioned that they knew they needed a Will, but didn't have one. It turned out that not one person out of the 15 around the table had a Will. They were a mixed group; some had children, some owned a house, some were married, but what they all had in common was that they all had decent jobs and all knew they needed a Will, yet not one of them had one. It seemed like a broken system, and this got Henry and Tim's wheels turning. They started meeting with a number of lawyers to see if there was potential for a more convenient, affordable solution, and LegalWills was born. Our first Will service went online in 2001, and the service has been expanded and improved every year for over two decades.

ABOUT US

With offices in Canada, the United States, the United Kingdom, and South Africa, LegalWills allows people to create common legal documents in a very easy, convenient, private, secure, and cost-effective manner, without the need to pay the high expenses of a lawyer. We work with local attorneys to develop online legal services that are of the highest quality and in accordance with the laws of the customer's local jurisdiction. We go far beyond any do-it-yourself kit or online repository of legal forms and documents. All legal documents can also be stored and maintained by customers online in a completely private and secure manner. This will ensure documents can be updated to reflect any changes in financial or family situations.



OUR EXECUTIVE TEAM



Tim Hewson,
Chief Executive Officer

Tim has been helping people to write their Will and other estate planning documents for over 20 years. He has over 15 years experience as a telecommunications consultant and Business

Manager for small companies in the UK and in Canada. He also has extensive experience in e-commerce business management for large corporations in Canada and the United States, in addition to his work as a Product Manager for market leading Call Center and Unified Messaging products.

He has been interviewed by many of the major news media outlets including CTV, Global News, The Toronto Star, and other leading Canadian publications. He has also contributed to a number of financial planning books, has written extensively on the subject of Will writing and estate planning, and is available to speak on said topics.



Henry Raud
Chief Technology Officer

Henry has held several technology and executive management positions in a multinational corporation. He was responsible for the successful delivery of many complex software

development projects.

Since co-founding LegalWills, he has full accountability and responsibility for all website and software development activities, as well as managing the finances of the corporation.



VISION

Empower everyone to take charge of
their own estate planning.



MISSION

To revolutionize the global estate planning industry by creating the most comprehensive, affordable, and accessible services on the market while removing barriers to information and education.



OUR MANDATE

- » **Everyone should be able to create a quality Will. Period.** No matter who you are, where you are, or your circumstances, estate planning should be accessible to all.
- » **Service above everything else (and not just for customers).** We're committed to helping you with your estate planning questions and needs, regardless of whether you're a customer or not.
- » **We don't guard knowledge or service.** We aim to eliminate all barriers to estate planning information – we have over 20 years of expertise and do the research so you don't have to.
- » **Will writing is not about death, it's responsible financial planning.** We're dedicated to changing the narrative around estate planning – it's more about preparation and planning than death.
- » **We don't do legal jargon.** Plain language is our priority.
- » **Customers come before costs.** We will always make things right with our customers, no matter the cost.
- » **We leave no stone unturned.** We fill market gaps; if a complementary or necessary service doesn't exist, we create it.
- » **We put purpose over profit.** We never sell customer data or advertise third party products, and have only changed our prices once since 2001.
- » **We were the first and plan to be the last.** We pioneered the industry by being the first to offer online estate planning services and have intentionally set up our business to outlive us.





Facts & Statistics



LegalWills

ABOUT WILLS

- » 62% of Canadian adults still do not have a Will and an additional 12% of Canadians noted that while they did have a Will, it was out-of-date.
- » It is important for every Canadian adult to have a Will, regardless of age or the value of assets.
- » It is common for people to assume that when they die, everything will automatically go to their spouse. If you have children, this only happens in Alberta and Manitoba. Every other province distributes an estate between a spouse and children. This can often result in a family home being sold off in order to create the required shares.
- » If you are living common-law, only some Provinces recognize this relationship - regardless of duration. For example, in Ontario dying without a Will in a common-law relationship gives the surviving partner nothing.
- » If you have minor children and both parents are involved in a common accident, your children are put in the care of guardians. Hopefully you will have family members who put themselves forward as candidates. Ultimately, a judge will decide on the most appropriate guardian from the selection of applicants.
- » Working with a lawyer to make a Will can cost you hundreds of dollars. This is why online Will services, where making a Will for an individual typically costs \$100 or less, are becoming an increasingly attractive and affordable option for Canadians.



LEGALWILLS FACT SHEET

- » LegalWills is Canada's #1 provider of online Wills, Power of Attorney, and Living Wills.
- » We are a Canadian company founded in 2000 and based in Ottawa, ON.
- » All of our employees are based in Canada and none of our customer service or development is outsourced.
- » We support all Canadian Provinces and Territories in both official languages.
- » Customer information is never shared or sold to any third party. Our revenue comes from the sale of the service alone so you will not even find an advertisement from a third party on our website.
- » Our website uses state-of-the-art digital encryption and security technologies to protect privacy and security.
- » Here are some of the services we provide at incredibly affordable prices:
 - Last Will and Testament
 - Mirror Will for spouse/partner
 - Power of Attorney
 - Living Will (Power of Attorney for Health Care)
 - Expatriate Will for property/assets held in Canada, the U.S., and/or the U.K.
 - Life Locker for storing personal information
 - Upload important files to your Vault
 - Document your funeral wishes and organ donation preferences
 - Write final messages which are only delivered after you pass away
 - Get your legal documents reviewed by one of our lawyers



OUR WILLS VS. LEADING COMPETITOR WILLS

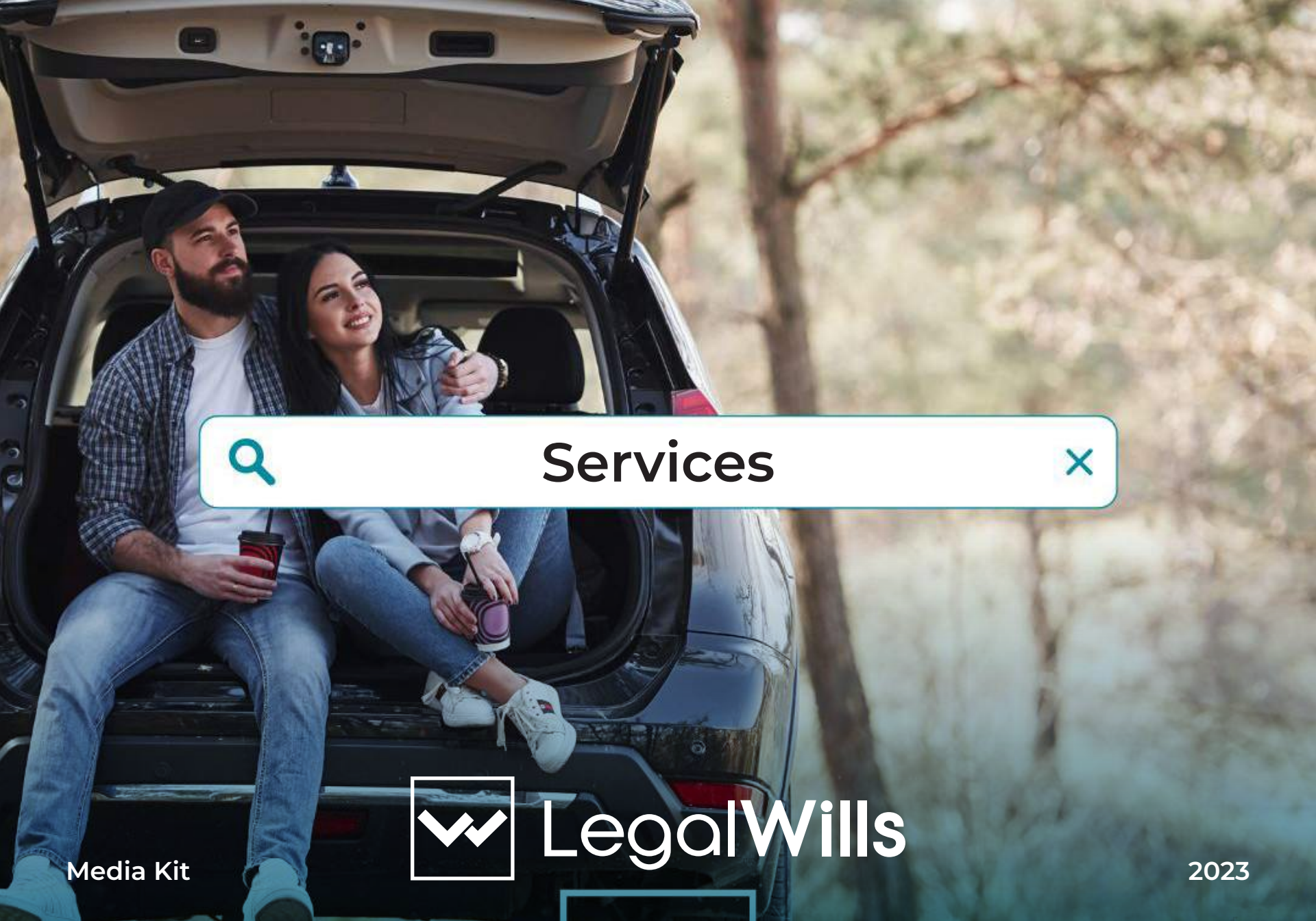
We are one of the few services that allows options like naming joint Executors with joint alternates, setting up a trust for a pet, or even a lifetime interest trust for blended families. What sets us apart from our competitors is the flexibility and countless options we allow for when choosing your distribution plan. We know that everyone's situation is different - one size does not fit all when it comes to making a Will. Our software's ability to allow for so many options and customization is what truly makes LegalWills unique.

LegalWills is the most cost-effective option in the market for creating common legal documents. For example:

Service	LegalWills	Leading Competitor
Cost of a Will	\$39.95	\$99
Complete estate plan	\$89.95	\$ 149
Mirror Will complete estate plan	\$143.76	\$ 249

Here is a glimpse of the features offered in the Will writing process using LegalWills in comparison with a leading competitor.





 **Services** 



LegalWills

WILL FEATURES	LEGALWILLS	LEADING COMPETITOR
Multiple alternate scenarios	✓	✗
Group beneficiaries	✓	✗
Staggered payouts for minor trusts	✓	✗
Different trust setup for different minors	✓	✗
Lifetime interest trusts	✓	✗
Text descriptions for a distribution plan	✓	✗
Joint Executors	✓	✗
Multiple alternate Executors	✓	✗
Flexibility with a Mirror Will	✓	✗
Complementary Wills to cover US or UK assets	✓	✗
Optional service to have the Will reviewed by estate planning lawyer	✓	✗
Multiple formats for your final document	✓	✗
ADDITIONAL SERVICES TO SUPPORT ESTATE PLANNING		
<i>MyFuneral service to describe funeral wishes</i>	✓	✗
<i>Service to document inventory of assets for your Executor(s) or Power of Attorney</i>	✓	✗
<i>Ability to upload files and documents to be accessed by family and loved ones</i>	✓	✗
<i>Ability to prepare messages to be distributed after your passing</i>	✓	✗



ADDITIONAL COMPLEMENTARY SERVICES

We are the only business in the world that combines the estate planning documents with the following unique services:

- » **MyLifeLocker** – the ability to document an inventory of important information to be accessed by your Executor (or Power of Attorney) at the appropriate time
- » **MyVault** – the ability to upload important documents to be accessed by your Executor (or Power of Attorney) at the appropriate time
- » **MyMessages** – pre-write messages to be distributed at the appropriate time by your “keyholders”
- » **MyKeyholders** – designate trusted people to login with a unique keyholder ID to access the information that they need when they need it.
- » **MyWalletCards** – you can order wallet cards to be held by your keyholders with your unique keyholder

PARTNER FEATURES

We offer the ability to embed the service entirely within another website and to completely “white label” our service so that it can be offered with no mention of LegalWills.





Partnerships



LegalWills

OUR PARTNERS

AirMiles	Rakuten	Meridian Credit Union
Syngrafi	NotaryPro	Perkopolis
Eirene	Sun Life	CAA
H&R Block	Clear Estate	Axess Law
Union Savings	Investors Group	NoticeConnect
Groupon	Canadian Hospice Palliative Care Association	Canadian Preplanning Council

To keep innovation at the forefront of what we do at LegalWills, we continue to partner with organizations that enhance the platform and service for customers on a global scale.



Media shout outs

LegalWills has been featured in:

- » [CTV News](#)
- » [CBC News](#)
- » Global News
- » [Toronto Star](#)
- » [The Globe and Mail](#)
- » [Financial Post](#)
- » The Canadian Press

And more!

For more information about LegalWill's media appearances, visit: legalwills.ca/Media or contact media@legalwills.ca

"LegalWills.ca is the most affordable and comprehensive online will service."

TORONTO STAR

Robb Engen, *The Toronto Star*,





 Testimonials 



LegalWills

2.8k+ Trustpilot Reviews with a 4.7 star rating



Very impressed with the will, power of attorney, and funeral wishes created by LegalWills. Fill in the fields and out comes a will written as well and as legal as one generated by a law firm for hundreds of dollars more.

In 2 days I had it completed and witnessed and in the hands of my executor. Now I sleep better.

1.1k+ Google Reviews with a 4.9 star rating



"A friend recommended Legal Wills to me. I saw how easy it was for him so I thought I'd try it. I wasn't disappointed.

We completed the wills for the wife and I in less than 2 hours. I was a little nervous at first but the program guided you throughout the whole process. It made it easy!
Thank You Legal Wills!"

400+ Facebook Reviews with a 4.9 star rating

AL-DEB L RECOMMENDS...

"LegalWills was reasonably priced, easy to use, included everything we (as a couple) needed (Will, Living Will, Power of Attorney & Funeral Wishes), provided great instructions & tips ... The site also includes great options like Life Vault and Digital Vault. After researching online Will options, we decided on LegalWills and glad we did."



i find that its great. it's simple to use although some questions are a little hard to understand, but as you keep going you tend to figure it out. i like that i can work on it a little at a time when i have the time. as a busy working mom finding the time is difficult so no rushing is a blessing.



"Great website that is super easy to use. Created simple will, power of attorney, living will for 2 people in about two hours. Easy to print and great instructions throughout. Definitely saved \$500+ over lawyer assisted documents."

JAMES H RECOMMENDS...

"With LegalWills, the process of establishing your last will and testament is easy, and inexpensive. What used to be long expensive sessions with a lawyer no longer exists with LegalWills. I highly recommend using them for one of the most important documents you will ever need."



THANK YOU

That's us in a nutshell!

If you have any questions about our
company or services, you can learn more at:
legalwills.com

