


Larke

Larke's features have been cleverly designed to keep your business ahead of the game in preparation for the Larke-v-Nugus storm, saving you valuable time and money in the process.

Making wills more safe... secure... robust.

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User Dashboard

The Dashboard allows you to track the progress of your will files from instruction to execution stage and beyond. You can easily navigate through your files by using the search bar at the top or sorting by date, stage or name.

Company admins also have access to a Supervisor Dashboard where they can track all will files from which they can not only track their own will files, but also their teams. This useful organisational feature allows you to monitor your team's productivity and keep a record of the circumstances surrounding each will, even after the fee earner has left the company.

The screenshot shows the Larke user dashboard interface. At the top, there is a navigation bar with the Larke logo, 'Dashboard', 'Admin' with a dropdown arrow, and the user name 'Olivia Anderson'. Below the navigation bar is a 'Dashboard' tab. The main content area is titled 'Recent Will Reports' with a subtitle 'Manage will reports and keep track of progress' and a '+ New Will Report' button. Below this is a table with columns for NAME, DATE STARTED, and STAGE. The table contains three rows of data:

NAME	DATE STARTED	STAGE	
AB Alice Banks	1 day ago	Completed	View Report
CD Carl Davis	0 days ago	Initial Instructions (stage 1 of 3)	Continue
EF Eleanor Franks	0 days ago	Initial Instructions (stage 1 of 3)	Continue



Traffic Light Notification system

The Traffic Light Notification system has been designed to keep wills on schedule in order to avoid potential negligence claims. The system warns you when there is too much delay between instruction and execution.



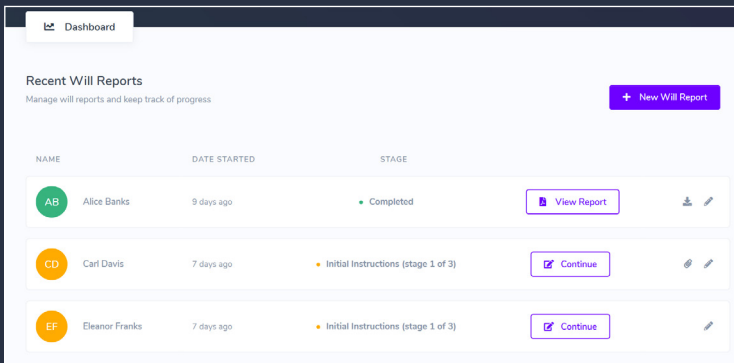
Green – You're right on schedule.











Amber – At least 7 days have passed since the report was initiated.



Red – At least 14 days have passed since the report was initiated. Act fast, you could be at risk of a negligence claim!

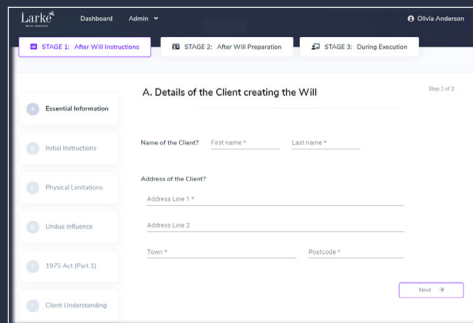


NAME	DATE STARTED	STAGE		
 Alice Banks	9 days ago	Completed	View Report	 
 Carl Davis	7 days ago	Initial Instructions (stage 1 of 3)	Continue	 
 Eleanor Franks	7 days ago	Initial Instructions (stage 1 of 3)	Continue	



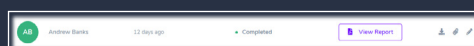
3 Stages: Simple and Intuitive

Larke mirrors the will-writing process and comprises 3 simple stages. Most questions can be answered by selecting a response from a drop-down menu. Each stage must be completed before you can progress to the following stage. Our software incorporates compulsory fields and will detect if you miss out something important.



- **Stage 1:** To be completed after taking initial will instructions.
- **Stage 2:** To be completed after preparing the final unexecuted will.
- **Stage 3:** To be completed during the execution meeting.

All the stages combined, should take no more than 15 minutes to complete. Once completed, the final Larke report is automatically generated using the information you entered at each stage. You can access this report at any time from your Dashboard.





1975 Inheritance Act Claim Checker

The Larke software analyses your answers and provides claim avoidance prompts where relevant. These warnings will alert you to potential claims against your client's will in the future, according to the terms of the Inheritance (Provision for Family and Financial Dependents) Act 1975.

The Larke Report serves as a permanent record demonstrating that your client has seriously considered their obligations under the 1975 Act, making their will more safe, secure and robust as a result.

- B Initial Instructions
- C Physical Limitations
- D Undue Influence
- E 1975 Act (Part 1)**
- F Client Understanding
- G Previous Wills

Does Alice Banks have any living spouse or civil partner? < Select > * **Yes**

Name? Spouse's Full Name *

From your interactions with Alice Banks, please give a brief description of their relationship with the person in question.

Relationship Details *
e.g. happily married, estranged, considering separation etc.

When was the last time Alice Banks saw the person in question? Date

Are they named as a beneficiary in the will? < Select > *

"If reasonable financial provision is not awarded to a spouse or civil partner, they may be more likely to successfully challenge a will after the testator's death. A will dispute can entail costly legal fees at the expense of other beneficiaries."



File management system

You can upload files, such as handwritten notes or annotated documents, to support your responses to Larke questions. These files will be attached for convenience to the final report generated.

Larke Dashboard Admin Olivia Anderson

STAGE 1: After Will Instructions STAGE 2: After Will Preparation STAGE 3: During Execution

File Attachment Type: Letter of Wishes

Please ensure the file name is as you would like to appear listed in the appendix of this report.

Attach File

Upload Cancel

