

Will Writing Firm of the Year - National

This award represents an exceptional Will Writing firm who has proven all round excellence in the practice area of Wills, Probate and Estate Management. Submissions are encouraged from firms who have 20 or more staff (including support staff) and predominantly offer a face-to-face or video service for clients.

Judges will be asked review how the organisation delivers technical expertise combined with robust risk management and an effective client and referrer engagement strategy across the spectrum of estate planning products and services.

The winning submission will outline how the organisation delivers service excellence uniformly across the business to clients located across England and Wales ensuring they are placed at heart of the experience.

Criteria

The winner of this award will:

- demonstrate extensive development and progress as a Will Writing firm within the last year, including, but not limited to: strategy, growth, financial performance, technology and innovation, employee onboarding and development, diversity, and training.
- demonstrate how a culture of excellence creates a balance between purpose and profit with demonstrable firm-wide adoption and buy-in; which in turn ensures staff are operating in the best interests of the client and the profession.
- evidence innovation in employee support (both professionally and personally) with a proactive approach to training, mental health and wellbeing, equality, diversity and inclusivity, alongside bravery in managing workloads and fee setting.
- demonstrate a clear approach to technology, IT security and cyber-crime prevention

Where possible, provide evidence of reviews/recognition/ testimonials/recommendations.

Firms will be asked to submit details of their website, reviews and social media channels for consideration as part of the judging process.