

DOCUMENTATION: Toolboxx Multi-Tenant Legal Platform

System Overview: Toolboxx is a UK-based SaaS platform providing legal automation tools. It utilizes a multi-tenancy model to deliver isolated, customizable suites of law tools to various law firm clients.

SECTION 1: Platform Architecture & Catalog

- **Client Name:** Toolboxx.
 - **Architecture:** Multi-tenancy SaaS platform for legal automation.
 - **Maintenance Entity:** Primary service providers responsible for optimization and maintenance.
 - **Tenancy Features:** Each firm can scale and customize tools to practice requirements.
 - **Core Service Categories:**
 - **Legal & Estate Services:** Will Writing, Living Will, LPA, Full Estate Administration, Equity Release, Conveyancer Search, Filing Cabinet.
 - **Bereavement Support:** Tiered "Help" modules (Little, More, Lots, Hand It Over), Online Grief Support.
 - **Final Wishes Support:** Funeral Wishes, Nags, Personal Messages, Trusted People, Digital Legacy.
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SECTION 2: Tenant Profile - Trust Inheritance

- **Tenant Name:** Trust Inheritance.
 - **Market Status:** Highest-volume tenant on the Toolboxx platform with the largest share of end-user traffic.
 - **Service Configuration Pillars:**
 1. **Legal Document Support:** Will Writing, Living Will, LPA.
 2. **Bereavement Support:** Tiered help modules, callback services, and counseling.
 3. **Final Wishes Support:** Digital filing (My Documents), personal messaging, funeral planning, and digital legacy management.
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SECTION 3: Detailed Service Definitions (Legal)

Service: Will Writing (Trust Inheritance)

- **Definition:** A legal document for distributing money, property, and possessions.
- **Options:** Single Will (for individuals) or Mirror Will (for partners/couples).
- **Pricing:** Online Single Will is £90.00; Online Mirror Will is £180.00.
- **Inclusions:** Unlimited access, signing advice, and phone support.

Service: Living Will (Trust Inheritance)

- **Definition:** Also known as an Advance Directive; lets medical professionals know treatment preferences if the user cannot communicate.
- **Legal Status:** Legally binding for healthcare professionals.
- **Pricing:** £60.00.
- **Comparison:** Unlike a Health and Welfare LPA, a Living Will provides specific guidance and conditions for treatment refusal.

Service: Lasting Power of Attorney - LPA (Trust Inheritance)

- **Definition:** Appoints "attorneys" to make decisions on a user's behalf.
 - **Categories:** * **Property and Financial Affairs:** For managing bills, property, and bank accounts.
 - **Health and Welfare:** For daily routine, medical care, and life-sustaining treatment.
 - **Pricing:** £240.00 per person, per individual LPA.
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SECTION 4: Detailed Service Definitions (Bereavement)

Service: Tiered Estate Administration (Trust Inheritance)

- **A Little Help:** Free foundational guide for immediate steps after death (registration, funeral arrangements).
- **A Little More Help (Executor Toolkit):** £600.00 (£500 + VAT); digital toolkit for applying for Probate and generating HMRC/legal forms.
- **Lots of Help:** £1,620.00 (£1,350 + VAT); hybrid service where legal teams fast-track Probate applications while users assist with admin.
- **Hand It All Over:** Starts from £5,220.00 (£4,350 + VAT); fully managed service where an SRA Regulated solicitor assumes all legal liability.

Service: Bereavement Support Tools (Trust Inheritance)

- **Book A Callback:** Free support line (0800 840 1665) for estate administration queries.
 - **Bereavement Counselling (GriefChat):** Free emotional support via professional counsellors, available Mon-Fri, 9am-9pm.
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SECTION 5: Detailed Service Definitions (Legacy & Security)

Service: My Documents / Digital Filing Cabinet (Trust Inheritance)

- **Function:** Organizes legal paperwork, financial data, and digital media (photos/music).
- **Pricing:** Basic is Free; Premium is £49.00/year.
- **Premium Features:** Unlocks Personal Messages, Funeral Wishes, and Digital Legacy.

Service: Premium Legacy Tools (Trust Inheritance)

- **Personal Messages:** Secured digital safe-haven for video/text/picture messages delivered by Trusted People when the time is right.
- **Funeral Wishes:** Guidance tool for burial/cremation preferences, generating a formal memorandum for executors.
- **Digital Legacy:** Management of online accounts (social media, email, stores) to prevent asset loss or unwanted subscriptions.

Service: Trusted People (Trust Inheritance)

- **Definition:** Security feature allowing nomination of up to 4 people to manage an account in an emergency.
- **Security:** Nominees receive unique credentials; all nominees are alerted if any one nominee logs in.
- **Pricing:** Free of charge.