



# FirstClass Web

## Core legacy management, on the web

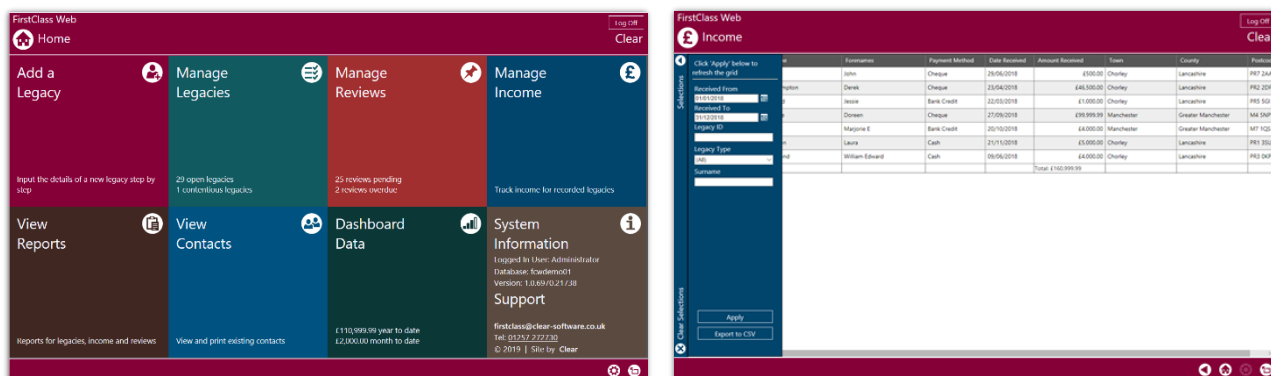
### FirstClass

FirstClass is the UK's leading legacy management software. Originally designed by a group of six charities over 20 years ago, FirstClass has been continually developed and improved, and along with FirstClass Web, there are nearly 100 not-for-profit organisations using it today.

FirstClass manages the intricacies of the legacy process and has been developed using the latest Microsoft technologies to be a professional, affordable and cost-effective tool for not-for-profit organisations seeking to maximise their income stream from legacies.

We know that no matter the size, every not-for-profit organisation needs effective legacy management. That is why, using our many years of experience developing legacy management software, we have created a suite of applications to provide a solution for organisations of all sizes. With a range of powerful features, organisations can choose from FirstClass In-house, FirstClass Cloud, FirstClass Essentials and FirstClass Web.

### FirstClass Web



FirstClass Web brings together a core set of features in a user-friendly interface, accessible anywhere via a web browser. Designed for charities who receive a smaller number of legacies and are looking to manage those legacies efficiently and realise the greatest income for their cause.

FirstClass Web is accessed through an online platform, with no software to install. Alongside the standard legacy information, FirstClass Web allows you to record legacy income, estimates, reviews, contacts and a complete contact history. This data can then be used to easily generate comprehensive reports.

FirstClass Web uses the same database as our other FirstClass products, so upgrading is straight forward to do – as your charity legacy income increases, FirstClass can grow with you.

# Key Features

## Built specifically with small charities in mind

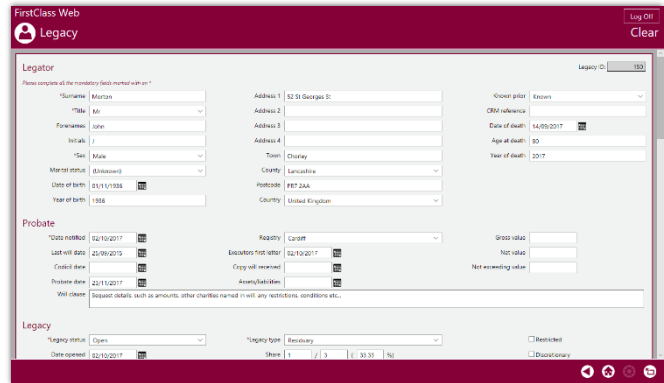
FirstClass Web has all the features needed for a smaller organisation looking for an accessible solution to their legacy management needs. It is intuitive and easy to use, offering a low-cost annual subscription and free support.

## Legacies

Users can easily add a new legacy including address details, key dates and probate details.

## Estimates

FirstClass Web allows you to record an estimate against each legacy to show how much income your charity is expecting to receive. You can also record the date you are hoping to receive this income.



## Reviews

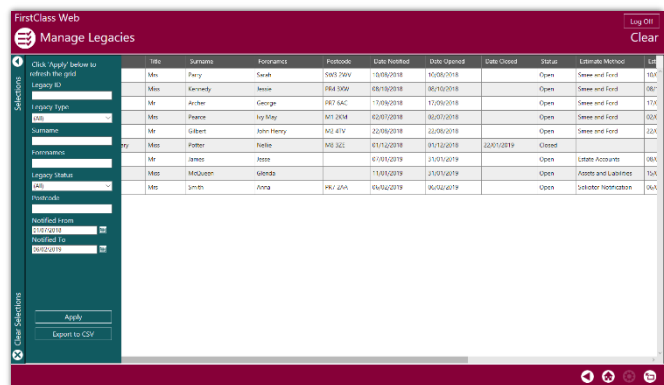
You can add a review against each legacy. You can then use the Manage Reviews browser to see at a glance the position of all the reviews.

## Income

Multiple income receipts can be recorded against each legacy. The Manage Income browser lets you easily see what income your charity has received over a given period.

## Browsers

There are a number of built-in browsers to enable you to search and view the legacies, income and reviews that you have recorded in FirstClass Web. The information shown in the browsers can also easily be exported to a CSV file, which can then be imported into Excel.



## Contacts

You can store information about a person, organisation or employee that you are liaising with regarding a legacy, e.g. executor, lay-executor, people at other charities, family members, etc.

There is a built in Contact Wizard to guide you easily through adding a new contact.

## Contact History

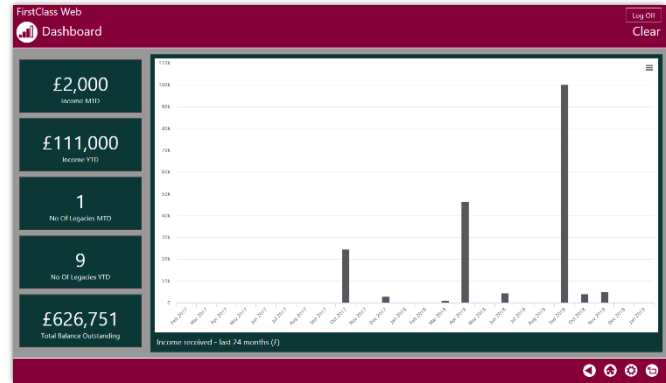
FirstClass Web allows you to manually create contact history records to record all communication associated with a legacy.

## Dashboard

The Dashboard provides a quick and easy picture of your recent legacy performance.

## Reports

FirstClass Web produces a core set of financial and managerial reports. The reports can be printed (if you have a local printer connected) or exported to a CSV file.



## Benefits

### Web browser based

As the program is web browser based it can be accessed online via any suitable PC, especially useful for those who work from home or travel out of office frequently.

### Legacy administration

- FirstClass is quick and easy to use – legacy officers find FirstClass intuitive and a real benefit.
- FirstClass can simplify workload management.

### Added value

- Skilled legacy administrators 'add value' to their legacy income by completing their job to a high standard. FirstClass can often help administrators to increase their efficiency and improve the quality of work undertaken, simultaneously increasing this value.
- A number of charities have attempted to quantify the value added by trained legacy officers using effective legacy systems, generating a figure between 5% and 8% - i.e. extra to the money they would have received by just 'thanking and banking'.

The table below shows you how much you can increase the value of your legacy income, just by simply adding 1% or a slightly larger 5% onto a yearly legacy income of £100K.

Increase on Legacy Income of £100K by 1%

**Increase of £1k per year**

Increase on Legacy Income of £100K by 5%

**Increase of £5k per year**

## Other Versions

There are other versions of FirstClass available:

- FirstClass In-house
- FirstClass Cloud
- FirstClass Essentials

More information can be found on our website.

## Legacy Link Special Offer

All new FirstClass Web customers can now take up a free offer from Legacy Link.

Legacy Link are offering complimentary access to its Legacy Helpdesk for the first 3 months of a new FirstClass Web licence being taken out. This service puts the charity in contact with one of their experienced legacy managers, who will be on hand to respond to any questions relating to the estate administration process.

The offer is for a maximum of 5 tickets over the 3-month period, allowing the charity to receive support and guidance from their team, with a 24-hour turnaround time.

The Legacy Helpdesk is ideal for charities that have the capacity to manage their legacy administration in house but need occasional support on specific and complicated legacies.

Examples of how to use the Legacy Helpdesk

- Carry out inheritance tax calculations to ensure the right amount of tax is being calculated
- A second opinion on a complicated matter before seeking legal advice
- Explaining complicated Will clauses
- Reviewing and challenging executor expenses
- Advice before agreeing to sign indemnities

To find out more information about Legacy Link and their Legacy Helpdesk, visit <https://legacy-link.co.uk/helpdesk>

## Free 30-day Trial

### Not sure if FirstClass Web is for you?

If you would like to try FirstClass Web, we are happy to offer you a no obligation 30-day trial, completely free of charge. Please ask us for further details.

## Contact Us

At Clear we specialise in the design, production & installation of reliable, cost effective, Microsoft based software. Whatever your needs, you'll find our experienced team has the expertise to develop an innovative bespoke solution and provide high quality technical support after installation. Don't hesitate to contact us.

Email	<a href="mailto:info@clear-software.co.uk">info@clear-software.co.uk</a>
Call	+44 (0)1257 272730
Web	<a href="http://www.clear-software.co.uk">www.clear-software.co.uk</a>