**Checklist for HR / People Directors**

The list has been prepared to help you think about what you need in place before you launch Leighan’s List. It considers highlighting what is already in place, signposting that for staff, but also considering why you are implementing it – i.e., what the benefits are for the company and your staff. You might include the following:

1. What benefits are offered to employees?
   1. Pension – specify the survivor’s benefits. Spouse, children etc
   2. Death in service (if applicable): what is the nomination process?
   3. Life insurance (if applicable): how do they find out the policy details and beneficiaries
2. How do employees access information about all of the above – provide:
   1. Online links
   2. Nomination forms
   3. Policy details
3. Why are you offering Leighan’s List?
   1. Because it can help your employees and their families at what would be a very difficult time for them
   2. To raise awareness of the importance of having a will
   3. To ensure that employees know what they are entitled to
   4. To raise awareness of the tax benefits of DIS/Life insurance being paid to a nominee rather than the estate
4. Are you supporting the introduction of Leighan’s List by doing any of the following:
   1. Salary sacrifice scheme to enable employees to get a will
   2. Access on-site to a legal professional who will provide a will
   3. Time off to see a legal professional about a will
   4. Time in work to start completing the list
5. Consider whether you have any examples of where this sort of scheme would have been beneficial and possibly some worked examples, e.g.:
   1. Death in service – no nomination, payment into estate and subject to estate debts. Josie died in service and did not complete a nomination; her DIS payment was 2x her salary, which was £52k. The payment went into the estate, which had debts of £25k for a car loan and £7k for various credit cards – these debts would reduce the money available from the DIS to £20k. If Josie had nominated her partner, then the £52k would have been paid to the partner and not be subject to estate debts,
   2. Tom is single and lives with his parents. His death in service payment would be £50k – he elected to nominate that 20% should be paid to his parents to cover funeral costs, with 40% each to his two nieces.