FOR FUNERAL DIRECTORS

You look after the funeral. LegacySteps looks after what comes after.

In the weeks after a funeral, a family has a dozen organisations to tell: the bank, Revenue, Social Protection, the pension, the insurers, the ESB, the phone company. Most families come back to you with the same questions. LegacySteps gives them one place to do all of it, with the letters already written, every reply tracked, and your name on every screen. It is free to the family and it costs you nothing to set up.

What your families get

- One list of everyone who needs to be told, with the letter for each already written in the form that organisation accepts.
- Each organisation shows told, replied or still waiting, until the list is done. Replies come back into the case, not into a crowded inbox.
- The death certificate is uploaded once and goes out attached to every letter sent by email.
- A printable sheet for the registration appointment, with everything the registrar will ask for.
- An assisted option: for a family who is not online, your staff complete it with them across the desk in a few minutes.
- Their details are deleted when the case is closed.

What you get

- Fewer calls in the weeks after the funeral, and a better answer when they come.
- Your name and logo on every screen the family sees. LegacySteps stays in the background.
- A dashboard showing each family's progress, without exposing their private details.
- A flat fee per family, invoiced monthly. No subscription, no minimum, no contract term. Add it to the funeral account, itemised, or absorb it.
- Ireland or the UK, chosen per funeral home, with the organisations and letters for each.

Your number is already waiting

Every funeral director on the IAFD register is already listed on LegacySteps with a number and its name and address filled in. Claiming it takes a minute and there is nothing to set up. From then on, the number is how families connect to you.

1 **Find your number**
Go to www.legacysteps.ie/claim and search your name or town. Enter your name, email and phone.

2 **We confirm**
Derek Fitzgerald rings the funeral home on its listed number, usually within one working day, and switches it on. You receive your sign-in email; there is no password, just a code.

3 **Give families your number**

Say it across the desk, put it in the arrangement pack or on your website. The family enters it on the sign-in page and your name appears on every screen. Or set them up yourself from your dashboard in about two minutes.

Where the details are kept

In Ireland	Seen only by those who need to	Deleted when done
Stored on servers in the EU (Ireland region). Used only for the notifications the family chooses to send. Never sold or shared.	A family sees its own case. A funeral home sees only the families it set up, and their progress rather than their letters.	When a case is closed the personal details are removed on a fixed schedule. Nothing sits in a database for years afterwards.

Questions funeral directors ask

Does LegacySteps contact the organisations for the family?

Only when the family chooses to. Nothing is sent until they click Send. By email it goes from LegacySteps and the reply comes back into the case; or they print and post it.

How much work is it for my staff?

About two minutes per family: name, email, and the type of case. For an assisted case, your staff sit with the family and complete the three steps with them, typically fifteen minutes.

Is it a replacement for a solicitor?

No. LegacySteps handles notifications: telling organisations that someone has died and what they need to do next. Probate, wills and the estate itself remain matters for a solicitor.

Can I try it first?

Yes. The three-minute walkthrough at www.legacysteps.ie/demo runs on a sample family. If you would like your own account to try with a real family, it will be set up the same day.

To switch LegacySteps on for your families: www.legacysteps.ie/claim, or ring Derek Fitzgerald on 087 759 9848, or email derek@legacysteps.ie. Walkthrough: www.legacysteps.ie/demo