

Grow your business.

A better service. A stronger client relationship.

Join the MyDigiSafe Agent Network and offer your clients real peace of mind, backed by a service you can stand behind.

Will Writers

Estate Planners

Financial Advisers

Help your clients get organised. Make life easier for those they leave behind.

Trusted & secure

Your clients' data is safe, backed up, and always theirs

Zero admin

We handle tech, billing, and client support

Differentiate your business

Stand out with this complimentary product - at no cost to you or your clients

Built on client trust

A service you can stand behind with confidence

The problem worth solving

Wills record who gets what - not where anything is.

When someone dies, for example, their executor can be left searching for bank accounts, pensions, insurance policies, investments, and digital assets - with no idea where to start.

This is the gap MyDigiSafe fills - and it's a gap clients will thank you for closing.

The scale of the problem

94%

of legal professionals find probate slow and complicated

72%

of those who struggled financially were aged 18-44

45%

of DIY probate applicants then sought professional help

14m

executor-to-institution communications initiated in the UK each year

Source: The Bereavement Index 2024, Exizent (sample: 425 legal professionals).

A will tells an executor who gets what. MyDigiSafe tells them where to find it.

Introducing MyDigiSafe is the natural next step after every will signing, Power of Attorney appointment, or estate review.

Trust & Continuity

We're increasingly asked: "What happens if MyDigiSafe isn't here one day?" It's a fair question, and your clients deserve a straight answer.

Your clients' data is never locked into MyDigiSafe as a company. They can export everything themselves, at any time, and every account is independently backed up.

That means the safety of their information never depends on any single business lasting forever - it depends on choices they control.

In short: their data is always theirs

How to answer the continuity question

Export anytime

Clients can download and export everything in their vault whenever they choose. Nothing is locked in.

UK-based and encrypted

UK-based servers, encrypted at rest and in transit, two-factor authentication. Data is never sold or shared with third parties.

A confident answer for you

When a client asks "will this still be here when I need it?", you can say: their information is exportable any time, independently backed up, and always under their control.

Independently backed up

Every account is backed up independently of day-to-day operations, so client data is never a single point of failure.

Client stays in control

Clients choose exactly who can see what, and when - immediately, or only on death. That control never changes, whatever else does.

Worth repeating to clients

"If anything happens to me, or to MyDigiSafe, everything I've stored is still mine - I can take it with me at any time."

What is MyDigiSafe?

MyDigiSafe is a secure online digital vault where clients store all the information their executor, attorney, and family will need. It has three account tiers - Store It, Share It, and Sort It - giving clients flexibility to start free and upgrade when ready.

Store It

£3.95/month

or £39.50/year

Secure personal digital vault. Clients store all key information - bank accounts, pensions, property, documents, and more.

- Personal Digital Vault
- Unlimited free guest accounts
- Free second account for couple
- Document and deadline reminders

Share It

£4.95/month

or £49.50/year

Everything in Store It, plus the ability to share access with executors, attorneys, and trusted family members.

- Share with executors and nominees
- Client controls who sees what
- Nominees get free Store It accounts
- Access set by client - now or on death

Sort It

£5.95/month

or £59.50/year

The complete solution. Share It plus Probate Toolkit - step-by-step estate administration with automatic data transfer.

- Probate Toolkit included*
- Step-by-step probate guidance
- Data ports in automatically
- Significant cost saving for family

*Probate Toolkit included in Sort It after a 24-month qualifying period. All plans include a 30-day free trial - direct debit details required at sign-up.

How to introduce MyDigiSafe to clients

You are not selling a product - you are solving a real problem your clients already have. Lead with the problem, then offer the solution.

At will signing

After signing, note that the will records who gets what - but not where anything is. Introduce MyDigiSafe as the natural completion of your service.

At Power of Attorney appointment

When discussing loss of capacity, highlight how MyDigiSafe helps an attorney access critical information quickly - reducing stress at the worst possible time.

At any estate review

Any meeting touching on assets, investments, or estate planning is a natural opening. The conversation fits perfectly alongside your existing advice.

In follow-up communications

Use newsletters, client letters, or review invitations. We provide copy-ready templates, approved logos, and social media content for your use.

Suggested script:

"As part of our estate planning service we recommend MyDigiSafe to all our clients. It is a secure online vault where you store your bank accounts, pensions, insurance policies, and key documents - so your executor can find everything they need immediately. There is a free 30-day trial with direct debit details required at sign-up. Shall I show you how it works?"

How to become an agent

Five simple steps. No minimum commitment.
No upfront cost.

What you get:

Access to your Portal dashboard

Client brochure (PDF - flipbook or print)

Marketing copy and social templates

Commission dashboard 24/7

Dedicated agent support line

Free MyDigiSafe account for you

Five steps to getting started

01

Register online

Visit agent.mydigisafe.co.uk/register.php and complete your agent registration form. We confirm within 2 working days.

02

Sign your Agent Agreement

A straightforward agreement covering your 20% commission rate and how payments work.

03

Complete onboarding

Work through our short online training guide (approx. 60 minutes). Receive your Agent Certificate on completion.

04

Receive your Agent Pack

Personalised client brochures, access to your Portal dashboard, and marketing templates.

05

Start introducing

Mention MyDigiSafe at will signings, Power of Attorney appointments, or estate reviews, then add their details to the Portal to trigger their invitation.

Your Recurring Income

You earn a recurring commission on every active subscription - paid automatically while your clients benefit from the service.

Once you've added a client's details to the Portal, commission is tracked automatically from there.
No invoicing. No chasing.

Paid on the 15th of each month

No paperwork, no invoicing required from you

Full dashboard at mydigisafe.co.uk/agents

No cap. No minimum referrals.

Commission schedule

Plan	Client/year	Your 20%/year
Store It	£39.50	£7.90
Share It	£49.50	£9.90
Sort It	£59.50	£11.90

What could you earn?

Active clients	Store It /year	Share It /year	Sort It /year
10 clients	£79	£99	£119
25 clients	£198	£248	£298
50 clients	£395	£495	£595
100 clients	£790	£990	£1,190

Annual earnings based on 20% of monthly fee x 12. Figures illustrative.

The Power of Retention

Because clients rarely cancel a bundled service, your commission keeps building year after year - from the very same clients, without you lifting a finger.

The figures opposite use the Share It plan as an example, assuming no client cancels and you introduce no new clients at all.
Paid on the 15th of each month

No paperwork, no invoicing required from you

Full dashboard at mydigisafe.co.uk/agents

No cap. No minimum referrals.

What could you earn over time?

Active clients	Year 1	Year 3	Year 5
10 clients	£99	£297	£495
25 clients	£248	£744	£1,240
50 clients	£495	£1,485	£2,475
100 clients	£990	£2,970	£4,950

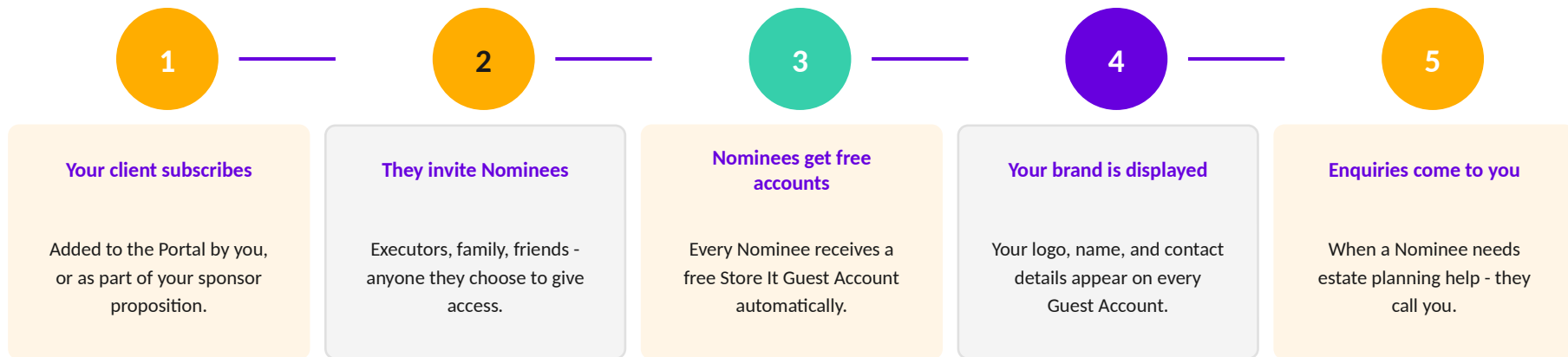
Figures use the Share It plan (20% of £49.50/year per client) and assume a steady client base with no cancellations. Illustrative only.

A head start for your existing clients

Every client already on your books today qualifies for a free Store It account (worth £39.50/year) when you introduce MyDigiSafe now. This one-off offer doesn't apply to future new clients, who receive the standard 30-day free trial - so it pays to start with your existing client bank first.

Your brand on every account - a marketing channel you never had before

Every free Guest Account and Nominee account created from your clients displays your full branding and contact details. These are people you have never met - but they now know exactly who you are and where to find you.



The numbers add up quickly

If you have 50 active clients and each invites an average of 3 Nominees - that is 150 people who have never met you, but know your name, see your brand, and have your contact details.

When they need a will, a Power of Attorney, or probate help - you are already there. This is warm lead generation at scale, at no extra cost.

Compliance essentials

Your role as an introducer

You are an introducer - not a data processor or controller for MyDigiSafe. MyDigiSafe Ltd is the data controller for all client data on the platform.

DO

Tell clients clearly what MyDigiSafe is before they sign up

DO

Direct clients to mydigisafe.co.uk/privacy before registration

DO

Keep a record that you made the introduction

DON'T

Input any client data into MyDigiSafe on their behalf

DON'T

Store client login credentials

DON'T

Represent yourself as managing client data on the platform

Regulatory position

Introducing MyDigiSafe does not constitute a regulated financial activity under FSMA 2000 and does not require FCA or SRA authorisation.

Common questions

Do I need to be regulated?

No. MyDigiSafe is a technology subscription - introducing it does not require FCA or SRA authorisation.

What if a client has a problem?

MyDigiSafe has a dedicated support team handling all technical queries directly. You are not responsible for technical support.

Do I get a free account?

Yes. Every agent receives a complimentary MyDigiSafe account so you can use it personally and speak from experience.

Is there a minimum commitment?

No minimum monthly referrals required. However, agents making no referrals for a period of 12 months will be asked to confirm their continued agreement to display their contact details to related contacts.

Can I use MyDigiSafe branding?

Yes, within our brand guidelines. We provide approved logos, copy templates, and social media imagery for agent use.

Ready to join the network?

Register at agent.mydigisafe.co.uk/register.php

Email: enquiry@mydigisafe.co.uk

Call: 0330 555 0533

Web: mydigisafe.co.uk/agents

Recurring

commission on every
subscription

Free

your own MyDigiSafe
account

No cap

on your earnings

Referred by your MyDigiSafe agent

MyDigiSafe

Your logo here

Company name

Tagline / speciality

Tel

telephone number

Email

email address

Web

website address

Which Partnership Option Fits You?

Three ways to bring MyDigiSafe to your clients - from the simplest introduction, to bundling it into your own service, to running it fully under your own brand.

Retail

Best for most agents

Simply introduce our services to your client. Explain the product options and pricing. You earn recurring commission - your client pays MyDigiSafe directly.

- Introduce the service
- Explain product options and pricing
- Add their details to the Portal
- They pay online, in their own time

Sponsor

Best for existing or growing services

Include our product as part of your own services. You pay the wholesale fee - your client pays nothing extra to us.

- Introduce the service
- Explain product options - no pricing needed
- Add their details to the Portal
- They join free, in their own time

Licence

Best for larger organisations

Licence the software from us for a licence fee, and provide the above services directly to your clients under your own brand.

- You collect all direct debit payments
- You grow your own business
- You receive income from Friends & Family members
- Fully white-labelled to your brand

Full process detail for Sponsor and Licence is on the following pages.

Become a Sponsor

This works especially well if you already offer clients a paid storage or storage-plus service - or are looking to build one. MyDigiSafe simply becomes part of what they're already paying you for.

Introduce the service, explain the product options, and add their details to the Portal to trigger an email invitation. They join free, in their own time - with no payment to us.

You pay MyDigiSafe the wholesale fee, and include our product as part of your own services.

Contact us for your wholesale rate

What sponsorship means for your business

Include in your own proposition

Wrap MyDigiSafe and the Probate Toolkit into your Document Storage Plan, Ongoing Service Plan, or any other proposition you offer clients. You set the retail price.

No cost to your clients

Your clients receive MyDigiSafe as part of your service - at no additional direct cost to them. You pay MyDigiSafe at a preferential rate and build it into your own fee.

Include your historical database

As a sponsor, you can include your entire existing client database at no cost to you or your clients. Every client gets a vault. Every vault displays your branding.

You own the client relationship

MyDigiSafe does not bill your clients directly. All client contact goes through you. Your brand is front and centre on every account your clients and their nominees hold.

Higher retention, lower churn

Because MyDigiSafe is bundled into a service clients already pay for, they rarely cancel. You retain them as a client right through to death, not just for a one-off transaction.

Probate work comes to you

When a client or their executor needs probate support, the Toolkit directs them back to you. Sponsors generate probate enquiries from clients they have never previously met.

Licence MyDigiSafe

Licensing suits larger organisations who want to run MyDigiSafe fully under their own brand, rather than as a bundled or referred service.

You licence the software from us for a licence fee, and provide the storage, sharing, and probate support services directly to your clients, under your own brand throughout.

You collect all direct debit payments yourself, and grow your own business - including income from Friends and Family members.

Contact us to discuss your licence fee and terms

What licensing means for your business

Full white-label control

Your brand appears throughout - no MyDigiSafe branding is visible to your clients at any point.

You collect all payments

Direct debit payments come to you directly, not via MyDigiSafe. You control pricing and billing entirely.

Include your historical database

As a Licensee, you can include your entire existing client database at no extra cost. Every client gets a vault. Every vault displays your branding.

You own the entire relationship

MyDigiSafe has no client-facing presence at all. Every account, every touchpoint, and every communication is entirely yours.

Friends & Family income

You also earn from any Friends and Family members who join through your platform, not just your direct clients.

Built for scale

Designed for organisations with the infrastructure to run this as a core part of their offering, not a bolt-on.