

INSTRUCTIONS FOR WILL

Please complete as fully as possible, and give additional information on a separate paper if needed.

SECTION 1 : YOUR DETAILS

Mr Mrs Ms Miss Dr

Your full Christian or forenames

Your surname or family name

Your date of birth

Your occupation

Your full postal address including postcode

_____ Telephone numbers

Day
Evening

SECTION 2 : ADDITIONAL INFORMATION

Have you made a Will before?

Yes
No

If so :

- (a) Where is the original?
- (b) It would be helpful if we could see a copy.

Do you live, or are you intending to live, permanently outside England and Wales?

No
Yes If yes, where will you be living?

Please read the following questions carefully. If you answer YES to any of them, please give details, as we may then need to take some additional information from you

Are you married?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have a wife or husband who will not be named as a major beneficiary?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you legally separated from your husband/wife or do you intend to separate in the near future ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you responsible for the financial support of anyone - such as a child, relative or partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you ever been divorced or are you now seeking a divorce?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you (or does your spouse or partner) have a child of any age who is mentally or physically disabled ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you intending to marry in the near future?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Please give details where appropriate, or indicate any other aspects of your family arrangements which you think we should know about. In particular, if you have children, adopted children or step-children, please give their full names, ages and (where they do not live with you) addresses.

SECTION 3 : EXECUTORS

Please give the full name(s) and address(es) of the person or persons you would like to wind up your estate and act as trustees if necessary. An Executor (you may have up to four) should be at least 18 years old and someone you can trust to deal with financial affairs, taking professional advice where necessary. An Executor is allowed to benefit under your Will. This Firm can accept appointment as Executor if requested.

Executor 1	
Christian/Forename	
Address	
Title	

Executor 2	
Christian/Forename	
Address	
Title	

Executor 3	
Christian/Forename	
Address	
Title	

Executor 4	
Christian/Forename	
Address	
Title	

If you wish your partner to be your sole Executor, please give the details of at least two other people who will act as Executors in place of your partner if he/she dies before or with you

SECTION 4 : FUNERAL DIRECTIONS

You may state your wishes for a Funeral - for example, by cremation or burial, or the form of any religious service.

These directions are not strictly binding on your executors, but in practice however executors always try to carry out expressed funeral directions .

<p>Do you wish to specify burial in your Will? If you have any special request, e.g. for burial in a particular churchyard, please give details here.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Do you wish to specify cremation in your Will? If you have any special request for the scattering of your ashes, please give details here.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

SECTION 5 : GUARDIANS OF CHILDREN UNDER THE AGE OF 18 YEARS

If you have children under the age of 18, and wish to nominate guardians for your children in the event that both parents die, please give their full names and addresses here.

Guardian 1	
Christian/Forename	
Address	
Title	

Guardian 2	
Christian/Forename	
Address	
Title	

You may also express wishes concerning the children's' upbringing - for example, the type of education you prefer, or for them to be instructed in a particular religious faith. If you have any particular preferences, please give details here.

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SECTION 6 : PERSONAL GIFTS

If you wish to make a gift, or gifts, of your “personal chattels” please give full details of the item and the beneficiary below

“Personal chattels” are defined in law to include motor cars, garden effects, domestic animals, plate, linen, china, glass, books, pictures, prints, furniture, jewellery, articles of household or personal use or ornament, musical instruments, wines and consumable stores - but do not include assets used in a business, or money or securities for money like a building society passbook, or share certificates or insurance policies.

You can of course leave certain of these items to one person and the rest to someone else.

Item(s)	Full name of beneficiary	Address of beneficiary	Relationship to you (e.g. friend/son/daughter)

If you do not wish to be specific in your Will or if these matters are likely to change frequently, it is possible to leave personal chattels to your Executors with a direction that they should carry out your wishes by reference to any list you prepare from time to time. If you would like to use this formula please tick here

SECTION 8 : JOINTLY-OWNED/OCCUPIED PROPERTY

Do you own a house (or any other land) which is jointly owned or occupied with any other person?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If your answer is yes, please give the address of the property	
Please give the full name of the person who occupies the house or land with you	
Is the house or land owned by you jointly with the person who occupies it with you?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If the house or land is owned jointly do you own it	<input type="checkbox"/> as Tenants in Common <input type="checkbox"/> as Joint Tenants <input type="checkbox"/> don't know
Is your joint occupier to be allowed to remain in the house after your death? <i>Note: this question is only appropriate either where you own the property in your sole name or jointly as Tenants in Common.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the joint occupier to have the use of the furniture in the house other than any items which have been left as specific gifts?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the joint occupier to be allowed to sell the house and use your share of the sale money in the purchase of another property for him/her to live in? <i>Note: if your answer is yes, it will be assumed unless you tell us to the contrary that the ownership of any new house will be on the same terms as the original house.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
When the house (or any alternative house) is finally sold, is your share in the sale money to form part of the residue of your estate?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If the sale money is to be paid to a named person or persons, please give his/her/their names and confirm whether they will have equal shares or a specific percentage of the money	

SECTION 9 : GIFTS OF RESIDUE

The Residue is everything left in your estate after taking out funeral and administration costs, any Inheritance Tax payable, and the value of items which have made the subject of specific gifts.

The Residue can be distributed :

- all to one person
- to several named people, or a group of people
- to charities
- to one person for life, with an outright gift to someone else when the first person dies
- in different shares, proportions or percentages

and can provide for what is to happen if a named beneficiary dies before you.

Please tell us in your own words how you would like the Residue to be dealt with; we can then advise you on the options or on any technical problems if necessary. Please ensure that you give details of an alternative beneficiary/beneficiaries to cover the eventuality of the first named beneficiary dying before you.

Fill in who will have the residue of your estate, e.g. my wife/my partner, or equally between my children, and give full names and addresses of the beneficiaries unless you have already given these on the form.

SECTION 10 : GIFTS TO YOUNG PEOPLE

Unless you say so, the capital of a gift to a young person becomes her or his property when the age of 18 years is reached. You can specify a later age if you prefer.

If you are thinking of establishing a trust to benefit a young person of any age, we shall gladly advise you.

If you wish to benefit a young person who is mentally or physically disabled, please indicate this.

Are you making any gifts to anyone under the age of 18 years? Yes No

Do you wish the young person to inherit at the age of 18 years? Yes No

If not 18 years, at what age do you wish any young person to inherit Years of age
(i.e. insist on having the capital paid to them)?

SECTION 11 : YOUR ASSETS AND LIABILITIES

It would be helpful to have an approximate indication of the present values of your assets, including anything you own jointly with your spouse or anyone else. If there are any major liabilities, such as a mortgage on a house, please give details.

Please also give full details of any business you own, either by yourself, as a partner, or as a shareholder in a “family company”.

Please remember to list as “assets” any sums which would be payable to your estate under any life and/or pension policies which you hold

Liabilities	Assets	Your assets £	Jointly owned assets £	Spouse's assets £
	Home Contents, belongings etc. Investments Cash at bank/building societies Insurance Policies Money owed to you Private e.g. family company shares Interest on business or partnership Agricultural property Miscellaneous Trust interests Gifts made in the last seven years Deduct mortgage or other liabilities TOTAL Your net annual income Your spouse's net annual income Estimate of net annual income available to survivor Do you have : Pension Fund (or undrawn pension) Life policies in trust Any future interest in a trust Any power to direct money in a trust			
On a separate sheet please give details of any other assets, including assets outside the United Kingdom				

The information you have given is intended to provide the basic framework of your Will. In many cases we can proceed to prepare a draft Will from these details. In other cases, we may need to advise you about your choices, or obtain more details from you.

Please remember that everything you tell us is always treated in the strictest of confidence and can never be disclosed to any unauthorised third party.

Do not hesitate to contact us if you need any help or advice in completing this form - just telephone the persons here with whom you normally deal, or the Solicitor whose name is on the letter sent to you with this questionnaire.

Whenever clients sign a Will we suggest that they consider also signing an Enduring Power of Attorney in order to facilitate the management of their financial affairs in the event of physical and/or mental incapacity. If you wish to discuss this please tick the box.