



**Part A – You and your family**

**01. EXISTING DOCUMENTS?**

	YES	NO
Do you have an existing Will?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an existing Enduring or Lasting Power of Attorney?	<input type="checkbox"/>	<input type="checkbox"/>

**02. YOUR DETAILS**

Forename(s) \_\_\_\_\_

Surname \_\_\_\_\_ Date of Birth

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

Occupation \_\_\_\_\_

Nationality \_\_\_\_\_

Do you consider England your permanent home?    **YES**     **NO**

Are you (or any other member of your family) known by any other names and do you own any assets in a different name? If so, please give details: \_\_\_\_\_

**03. YOUR MARITAL STATUS**

Single     Married     Separated     Divorced

Name of spouse (please include any former spouse so we can check there is no conflict accepting your instructions) \_\_\_\_\_

Forename(s) \_\_\_\_\_

Surname \_\_\_\_\_ Date of birth

Date of marriage       Date of divorce

Address \_\_\_\_\_

Occupation \_\_\_\_\_

Nationality \_\_\_\_\_

Does your spouse/civil partner/partner consider England their permanent home?    **YES**     **NO**

#### 04. YOUR CHILDREN

(If you also have step children, please tell us)

Forename(s)	
Surname	Date of Birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Address	

Forename(s)	
Surname	Date of Birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Address	

Forename(s)	
Surname	Date of Birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Address	

### Part B – Your home and other assets

#### 05. YOUR HOME

Is your home:

a. Owned:	<b>YES</b>	<b>NO</b>
i. in your name alone?	<input type="checkbox"/>	<input type="checkbox"/>
ii. in joint names with your Spouse/civil partner/partner?	<input type="checkbox"/>	<input type="checkbox"/>
iii. in the name of your Spouse/civil partner/partner alone?	<input type="checkbox"/>	<input type="checkbox"/>
b. Rented?	<input type="checkbox"/>	<input type="checkbox"/>
c. Other – e.g provided by a relative?	<input type="checkbox"/>	<input type="checkbox"/>
If your answer was (c) please give more details:	<input type="checkbox"/>	<input type="checkbox"/>

#### 06. YOUR ASSETS

	<b>YES</b>	<b>NO</b>
Do you have a business?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own assets jointly with anyone else?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own any assets abroad?	<input type="checkbox"/>	<input type="checkbox"/>
Have you made any gifts of more than £3,000 per year in the last 7 years?	<input type="checkbox"/>	<input type="checkbox"/>

## 07. YOUR MAIN ASSETS

Please list your other main assets below and give approximate values:

ASSET	SOLELY OWNED OR JOINTLY OWNED	CURRENT VALUE
Land and Property		
Foreign Assets		
Bank and Building Society Accounts		
Investments		
Life Insurance		
Pensions		
Business interests		
Valuable items		
Other assets		

## 08. YOUR WISHES

Funeral:

You may specify in your will if you wish to be:

Buried       Cremated       No Preference

**09. EXECUTORS**

You must appoint executors to carry out the instructions in your will. It is wise to have at least two and you may appoint your spouse/civil partner/partner as one. You should name other executors to act if he/she is unable to do so. Partners in our firm will be pleased to act as your executors.

**List below up to four chosen executors:**

Name \_\_\_\_\_  
Address \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_

\_\_\_\_\_ **YES NO**  
Would you like partners from our firm to act as your executor(s)    
either alone or with your individual executors?

**10. GUARDIANS**

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the child's other parent are both dead but we will discuss this with you in more detail.

Name \_\_\_\_\_  
Address \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_

## Part C – Beneficiaries

### 11. DEPENDANTS

Your executors are responsible for collecting in the assets of your estate and paying your liabilities. The remainder is called “the residue”. Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as “beneficiaries”.

	YES	NO
Are you leaving anything to a person who is dependent upon or may be eligible for means tested benefits in the future?	<input type="checkbox"/>	<input type="checkbox"/>

### 12. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

Name	
Address	
	Amount £

Name	
Address	
	Amount £

Name	
Address	
	Amount £

### 13. GIFTS OF ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items, such as jewellery, ornaments, books etc and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing.

Name	
Address	
Article	

Name

Address

Article

Name

Address

Article

Name

Address

Article

#### 14. THE RESIDUE

This is all that you own except jointly owned property and the gifts made in questions 12 and 13. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

**The following are the more common provisions made. If you wish to use one of these tick the appropriate box.**

a. Everything to my spouse/partner/civil partner named at question 2 above, outright,  
but if he/she has died then to my children, named at question 4 above, equally;

b. Everything to my children, named at question 4 above, equally and any other children of mine;  
You may choose the age at which your children will receive their entitlement.

Insert choice from 18, 21 or 25 years in this box:

c. To my spouse/civil partner/partner named at question 2 above, but if he/she has died before  
me to the person(s)/organisation(s) named in the box below. If not in equal shares, then show  
the share each is to take.

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**Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?**

Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
\_\_\_\_\_  
Share  
\_\_\_\_\_

Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
\_\_\_\_\_  
Share  
\_\_\_\_\_

**If your chosen beneficiaries were to pass away before you, is there a charity or charities that you would like your residuary estate to go to?**

Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
\_\_\_\_\_  
Share  
\_\_\_\_\_

Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
\_\_\_\_\_  
Share  
\_\_\_\_\_

**GENERAL NOTES**

01. A Will is usually completely cancelled if you marry or form a civil partnership after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage or civil partnership into account.
02. On divorce or civil partnership dissolution, gifts to your spouse or civil partner are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
03. If you are not making any provision for a spouse or civil partner, or a former spouse or civil partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.

