

## WILL INSTRUCTION FORM

Please do not be frightened of making a Will. It is not a death warrant, but a sensible arrangement for the future, like taking out insurance. It will probably save unpleasantness, uncertainty and expense for those who are left behind. Wills are legal documents which often have far-reaching effects.

This form gives us some basic information and an idea of your intentions. When we receive it we could arrange a meeting, if you wish; otherwise we shall telephone you to discuss any queries which we may have before drafting the Will.

Some of these questions may seem inappropriate to your particular case, but experience shows that the answers can be important, so please complete the full form.

Some of the questions on the form are also designed to alert us to more complex legal problems which we might need to discuss with you.

We do advise that husbands and wives or couples living together should make Wills at the same time. If their two Wills are not dovetailed, there can be surprising and unfortunate results in the event of both partners dying together. Unless there is some conflict of interest, it is permissible and indeed usual for us to deal with both Wills together.

If there is insufficient space on the form for the answer to any question, please continue on the back of the form, or on a separate sheet.

## QUESTIONS ABOUT YOU

**Full names (please underline surname) :**

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**Full postal address (including post code) :**

**Contact details :**

Home :

Work :  
(if you are happy for us to contact you there)

Fax :

E-mail :

**What are your personal circumstances? (Please tick one)**

Married and living together

Married but separated

Widowed

Divorced

Never married

**What is your date of birth?**

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**If you have children, what are the full names and ages of all of them?** Please indicate clearly if any of them are (a) adopted by Court Order, or (b) not your own child or formally adopted, but merely treated as one of your children.

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**Are you sure that you are treated as resident in England (or Wales) for tax purposes and that your domicile (permanent home) is in England (or Wales)?**

Yes

No

In any case where the answer is No, please give details, since special considerations may apply

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## QUESTIONS ABOUT YOUR WISHES

**If you have a wife/husband/partner, do you wish everything to go to him/her if you die first?**

Yes  No

If not, please indicate your wishes clearly, by using the following paragraphs

**If you do not have a wife, husband or partner, OR if the two of you die together, OR if your wife, husband or partner dies first, OR if you have answered No to the previous question**

(a) Do you want to leave any cash legacies (e.g. to friends, relatives or charities etc)?

Yes  No

If Yes, please give details :

(b) Do you wish to make any gifts of specific items to friends, relatives or charities etc?

Yes  No

If Yes, please give details :

(c) Whom do you wish everything else to go to? (If more than one person, please either say "equally" or give percentages.)

**If young people might become entitled to substantial sums under your Will, what age should they reach before they can insist upon having their share in full? We suggest either 18 or 21 or 25. We will include in the Will wide powers for the Executors to use funds at their discretion for the benefit of young people until they reach the specified age.**

18  21  25  Other Age (please state)

**If you wish to include substitute provision in case your principal beneficiaries die before you or with you, please give full details.**

**If you wish to include in your Will notification of any special wishes as to burial or cremation, please give details.**

**If you wish to appoint a legal guardian or guardians for your children while they are under 18, please give details here. The guardian may also be an Executor (see next question), or not, as you wish.**

**Who do you wish to act as Executors (the person or people whom you appoint to settle your affairs)?** *You may appoint from one person up to four, as you wish. There is nothing to stop beneficiaries of the Will from acting as Executors. It is often simplest for the surviving spouse or partner to act on the first death. Solicitors, accountants, etc. can also act as Executors for you if you wish; the expense of this is not likely to be much different from appointing individual Executors who then ask solicitors to deal with the administration work on their behalf.*

**Please indicate below if you do not wish your Will to be registered on the Certainty Will Register**

Do not register my Will

## **QUESTIONS ABOUT YOUR ASSETS AND LIABILITIES**

**We only need to know about your major assets and liabilities.** *Of course all information given to us is confidential. Any asset or debt (or group of assets) which amounts to less than £10,000 need not be included. Please take care to say when assets are in joint names. (The list below is not necessarily complete : please include any other categories).*

Nature of asset

Total value

- Land and buildings
- Stocks and shares (taken together as one lump sum)
- Bank and Building Society accounts (taken together as one lump sum)
- Life insurance
- Valuable possessions, e.g. jewellery, silver or pictures.
- Pension policies
- "Death in service" benefits

Nature of liability

Total value

- Mortgages.

Source of Funds

To comply with anti money laundering regulations we are required to identify the source of funds. Please provide us with a brief explanation as to how the above assets have been acquired.

**Have you made any substantial gifts over the last 7 years (more than £3,000 in any tax year)?**

**Are you already entitled to any continuing interest under a Trust, Settlement or Will made by someone else, whether it pays you anything at the moment or is only for the future?** *Do not include here benefits which you might get from the Will of someone who has not yet died, see below*

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**Do you expect to inherit any substantial amounts over the next few years?**

Yes

No

If Yes, please give details :

**Please include any additional details here :**