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**Instructions for the
Preparation of my Will**

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HERRINGTON & CARMICHAEL

INSTRUCTIONS

for the preparation of my Will

Full name:

Full name: (spouse/partner)

Address:

.....

.....

Telephone No.:

Date of Birth :

IMPORTANT Succession and Inheritance Tax is one of the few areas where marriage/civil partnership can have an important effect. Please specifically confirm that you are married/in civil partnership with the person described above as your spouse/civil partner.....

Have we acted for you on any matter in the past ?

If not, what/who has introduced you to us ?

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INSTRUCTIONS FOR THE PREPARATION OF A NEW WILL

Thank you for contacting this firm in connection with your proposed new Will.

In order that we may prepare the document to reflect your wishes it would be helpful if you could complete the following questionnaire.

It may be that the questions asked do not cover all of your requirements, particularly if your estate is of a sufficient value to attract Inheritance Tax. The schedule of assets and liabilities is designed to help you calculate the value of your estate.

Alternatively, you may wish to set up a Trust Fund in favour of your family or in respect of a disabled person. Perhaps you would like to allow someone to have a life interest in your house, or a right to occupy it for a period of time after your death. Matters of this nature must be discussed further and you should arrange an appointment.

The costs of preparing the Will depends upon the complexity of your requirements and the final document. If you have any queries concerning your wishes please do not hesitate to raise them with us.

Please provide details of all children and also any people who may in any way be dependent on you, i.e. Step children, former spouse, elderly relative.

Name	Relationship	Age
.....
.....
.....
.....
.....

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Do you have any Grandchildren? If so please state

How many.....

Roughly what are their ages.....

Is any person who might benefit under your Will subject to any form of handicap? By handicap we normally mean a physical or mental handicap but in some circumstances this could also mean a financial handicap such as Bankruptcy or other financial problems.

Name.....

Nature of Handicap.....

In the event that you have been married or in an earlier civil partnership please confirm whether the marriage/civil partnership end as a result of death or divorce. If it ended as a result of death provide details of the former spouse/civil partner, date of death and any Will. This information may be important in relation to Inheritance Tax planning.

Details of former spouse/partner.....

Date of death.....

Details of Will

The Will that is prepared for you will revoke all former Wills or testamentary dispositions made by you. It is very important that if you have a Will in another country that covers property owned in that country, that this Will does not revoke that one. If you do own foreign property the Will that is being prepared can be written so that the foreign Will is not automatically revoked.

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Real estate that is owned abroad may not be able to fall under your UK Will (eg France), and you must speak to us to determine whether a Will should be made in the country where you own property. It is not unusual for some countries to provide for real estate to pass to various family members and to be excluded from your Will.

Do you own property abroad ?

If yes, is this Will to cover your UK assets only, or is it to include any of those foreign assets?

.....

Address of foreign property

.....

.....

If you are not married is this Will to be made in contemplation of marriage?

If yes, please give the full name of your fiancé if different from the partner detailed above.

.....

Family and Executors may read the Will before your funeral, but it is not uncommon to include a note of your funeral wishes in your Will as a guide to the family and your executors. Do you wish to include such a guide in your Will?

Burial/Cremation wishes:

.....

(Please ensure that your family/executors are aware of your burial/cremation wishes as by the

time the Will is read it may be too late!)

You may prefer to leave a letter of wishes with your Will with details of the arrangements you would like.

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Would you like this firm to be your **Executors** either alone or jointly with anyone else?:

.....

Full names and addresses of your Executor(s) other than this firm :

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.....

It will be necessary to also appoint **Trustees - these may be the same people as your Executors**. You must have at least 2 but no more than 4 Trustees.

Would you like your Trustees to be the same people as your Executors?

.....

Full name and address of your Trustees other than this firm :

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If you have children under the age of 18 then you should appoint Guardians.

Full name and address of person(s) who will be responsible for your children until they reach 18:

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.....
.....

Note – Before appointing Executors, Trustees and Guardians you should ensure that your chosen person or people are willing to take on the responsibility.

Specific gifts to be made from your estate before any other distribution or benefit is given - Full names and addresses of legatees and, if other than money, a sufficient description to enable your executors to recognise any item gifted (If at the time of your death the item gifted is not in your estate then the gift will fail, a substitute item will not be offered. Also, if the person to whom you have left the gift has died before you the gift will fail, the item will not be given to that person's family) :

For couples, do you want these gifts to take place on the first or second death ?

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Do you want to provide for a substitute gift - If yes, what?

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Do you want to provide for the gift to go to someone else should the chosen beneficiary have predeceased you - If yes, who?

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.....
.....
.....

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Do you want to include any Inheritance Tax saving provisions in the Wills?

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.....

If you are married do you want what is left in your estate after the payment of your liabilities and testamentary expenses, and also any specific gift mentioned in above, to go to your spouse?:

.....

- Full name and address of your spouse (if different from above):

.....
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.....

If you are not married but live with a partner do you want what is left in your estate after the payment of your liabilities and testamentary expenses, and also any specific gift mentioned above, to go to your partner?:

.....

- Full name and address of your partner (if different from above):

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.....

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If you wish to give what is left in your estate after the payment of your liabilities and testamentary expenses to someone other than your spouse/partner or if your spouse/partner should predecease you :

Full Name	Address	Relationship (if a step-relation please clearly)	Legacy or share of estate
<i>e.g.</i> <i>Freda Smith</i>	<i>1 New Road</i> <i>Newtown</i>	<i>daughter</i>	<i>a percentage or share</i> <i>eg</i>
<i>Fred Smith</i>	<i>24 Old Road</i> <i>Oldtown</i>	<i>son</i>	<i>1/2 residuary estate</i>

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(Again, if a chosen beneficiary has predeceased you, unless that beneficiary is your child, the gift will fail and will fall outside your estate. This means that it will be administered according to the laws of intestacy and may go to someone you did not want to benefit).

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Do you want to provide for the gift to go to someone else should the chosen beneficiary have predeceased you - If yes, what and to whom?

e.g. gift over to their children.

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If a terrible accident were to happen and you, your spouse/partner and the children were all killed together what would happen to your estate then?

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Do you wish your children to inherit at 18?

.....

If you feel that 18 is too young, what age would you like inserting in your Will?

.....

Under the general law your Trustees have very limited powers to advance income from the invested legacy and of the capital itself for the education and benefit of your children and you may feel that this would restrict your children's development. Do you wish to have the Trustees powers extended to enable them to use the legacy to help the children in any financial way?

.....

If you do wish to extend the Trustees powers do you wish to impose any specific limitations on those powers?

.....

.....

The guardians may be put to considerable additional expense and discomfort in looking after your children, particularly if your children are very young, or perhaps challenged in any way. Do you wish your Trustees to have additional powers for example to be able to allow the children and the guardians to live in your house or a larger house than their own? Or perhaps lend Trust monies on an interest free basis?

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Is there any particular requirement or additional power you would like your Trustees or Guardians to have in bringing up your children ?

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If you are self employed, under the general law, your executors can only keep your business running with only the capital in it at the date of your death for up to a year and with a view to selling it as a going concern otherwise the business is closed. **Do you wish to extend these powers to enable your executors to run your business as they would their own until such time as your children or your nominated beneficiary is able to take it over?**

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**IN ORDER TO PROVIDE PROPER ADVICE ON A WILL WE
NEED TO KNOW ABOUT YOUR FINANCIAL SITUATION.
PLEASE COMPLETE THE FOLLOWING TWO SCHEDULES
TO ENABLE US TO FULLY CONSIDER YOUR POSITION.
WITHOUT THIS INFORMATION ANY ADVICE WE GIVE MAY
BE INADEQUATE.**

Approximate value

Assets

You

Your spouse

Jointly owned

(Tenants in Common

or Beneficial Joint Tenants)

House

Contents

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Car

Jewellery

Cash at bank

Cash at building society

Quoted stocks & shares

Partnership share or value of a sole business, What is the business?

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PEPs /ISAs

TESSA

Unquoted stocks and shares (eg in a private company)

Other Assets, including non UK (please specify)

Do you expect to inherit from a parent, other relative or family trust. If so please provide details.

Do you own any assets situated outside the United Kingdom (the Channel Islands and Isle of Man are **not** part of the United Kingdom).

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Life Assurance Policies

Life Insurance Company

Policy Number

Sum Assured

Premiums

Purpose of Policy

Whether or not in trust

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Pension Death Benefits

Pension Scheme/Policy

Amount of Death Benefit

Widow's or Widower's Pension

Is Death Benefit in Trust?

Nomination Form Completed

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Liabilities

Mortgage

Other liabilities

Watchmoor Park
Camberley
Surrey
GU15 3YL

tel: 01276 686222

3&4 Market Place
Wokingham
Berks
RG40 1AL

tel: 01189 774045