

## **GUIDELINES**

If you wish to instruct us in connection with the preparation of your Will it would be helpful if you would consider the following and complete the attached information sheets with as much details as possible.

Please note that this form is to give us initial guidance and your wishes will be discussed with you in more detail before a draft Will is prepared.

### **BURIAL/CREMATION**

- You may wish to express a desire to be buried or cremated.

### **EXECUTORS**

- Your executor(s) will be responsible for administering your estate after your death. They will ensure that this is in accordance with your wishes.
- You may appoint up to four executors and four substitutes, we advise that at least two executors are appointed.
- The executor(s) can also be a beneficiary of your Will.

### **GUARDIANS**

- If you have children under the age of eighteen, then we would advise appointing guardians.
- The appointed guardians will be able to exercise parental rights, even if they are not the people who have physical care of the children.

### **SPECIFIC BEQUESTS**

- These are any specific items or sums of money that you wish to leave by your Will.
- Any tax due on these items will be payable out of the residuary estate, unless otherwise specified.

### **RESIDUE**

- The term “residuary estate” refers to the assets/money left once all debts, funeral and testamentary expenses and specific bequests have been paid.
- You may choose to leave your Estate to one or more people in equal or unequal shares.
- You can also specify who you would like to inherit if a beneficiary predeceases you.
- You will be advised if leaving assets in Trust would be beneficial for you.

**YOUR PERSONAL INFORMATION**

(Please use further sheets if necessary)

**YOUR FULL NAME:**

**TELEPHONE NO: .....**

**ADDRESS:**

**DATE OF BIRTH:.....**

**SPOUSE/PARTNER**

**FULL NAME**

**ADDRESS (IF THEY DO NOT LIVE WITH YOU)**

**DATE OF BIRTH**

**CHILDREN**

**(Please give full names including middle names, full addresses including postcodes and DOB.)**

- 1**
- 2**
- 3**
- 4**
- 5**
- 6**

**GRANDCHILDREN**

**(Please give full names including middle names, full addresses including postcodes and DOB.)**

- 1**
- 2**
- 3**
- 4**
- 5**

**IF THERE IS ANY PERSON THAT YOU DO NOT WANT TO BENEFIT FROM YOUR ESTATE,  
WHO MAY FEEL THAT THEY ARE ENTITLED TO DO SO AND THEREFORE POTENTIALLY  
MAKE A CLAIM, PLEASE GIVE THEIR DETAILS HERE: -**

**DETAILS FOR WILL**

**EXECUTORS**

**NAME:  
ADDRESS:**

**NAME:  
ADDRESS:**

**GUARDIANS**

**NAME:  
ADDRESS:**

**NAME:  
ADDRESS:**

**BURIAL or CREMATION?**

**Place, if any, to be specified**

**SPECIFIC BEQUESTS**

**RESIDUARY BENEFICIARIES**

**NAME:  
ADDRESS:**

**NAME:  
ADDRESS:**

**SHARE OF RESIDUE:**

**NAME:  
ADDRESS:**

**NAME:  
ADDRESS:**

**SHARE OF RESIDUE:**

**ASSET INFORMATION**

This is required so that we can ensure that your Will is as tax efficient as possible. It also enables us to consider if any specific administrative clauses are required.

Approximate values will suffice

If you are completing the form for yourself and your spouse, please specify in whose name the assets are held or whether they are in joint names.

**Joint names            Mr.            Mrs/Miss**  
**(approximate values £)**

<b>TYPE</b>	<b>Joint</b>	<b>Mr</b>	<b>Mrs</b>	<b>Approx value</b>
House/Other Property				
Mortgage				
Pension/Life Assurance/ Insurance Policies, etc.				
Bank Accounts				
Building Society Accounts				
Stocks and Shares				
Business Interests				
Agricultural Property				
Other (e.g. Premium Bonds, Savings Certificates, Antiques)				
Trusts (are you the beneficiary or				

Trustee of any Trust?)				
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**DOMICILE**

If you were born in the UK you are almost certainly domiciled here. However, please let us know if you/either of you:

- (a) Have parents who lived abroad or are/were of another nationality
- (b) Were born in a foreign country
- (c) Have been resident in a foreign country at any time.

If so, please give the periods of time.

- (d) Have assets abroad? (Please provide details below)

Asset	Country	(approximate value)		
		Joint	Mr.	Mrs.

- (e) Please let us know whether you have an existing foreign Will to cover any foreign assets.

Every individual must have a domicile

**DOMICILE OF ORIGIN**

Normally, a domicile of origin will be determined at birth i.e. a child acquires as his domicile of origin his father’s domicile at the date of birth.

**DOMICILE OF DEPENDENCY**

A minor child who has a domicile of origin from his/her father will acquire a new domicile if his/her father acquires a new domicile.

**DOMICILE OF CHOICE**

Domicile can change if an individual voluntarily acquires a new domicile. However, unless all connections with the previous domicile are broken, this is difficult (if not impossible) to show acquisition of a domicile of choice.