

WILL INSTRUCTIONS FORM

PERSONAL DETAILS

1. Full Name _____
2. Are you known by any other name? Yes No
3. If yes, please state name known by _____
4. Full Address _____
5. Email Address _____
6. Occupation _____
7. Contact Number _____
8. Gender? Male Female
9. Date of Birth _____
10. Place of Birth _____
11. What is your nationality? _____
12. Have you made a previous Will? Yes No
13. If yes, what arrangements have you made for revocation? _____
14. What is your relationship status? Single Married Unmarried Divorced Separated

SPOUSE OR PARTNER

15. Full Name _____
16. Names by which normally known, if different _____
17. Occupation _____
18. Date of Birth _____
19. Place of Birth _____
20. What is your nationality? _____
21. Have you been previously widowed? Yes No
22. Are you legally married or have entered into a civil partnership? Yes No
23. Are you intending to marry or enter into a civil partnership in the near future? Yes No

CHILDREN

24. Do you have any children? Yes No

25. If yes, how many?

Full names and ages/DoB of children	Addresses (if different)

26. The provision for family & dependent Act 1975 provides that certain categories of applicants may apply to the court for financial provision. This could include **former spouse not married, person treated as child of family by you or partner, persons wholly or partially maintained by your or partner**. Are you aware family members who may fall into this category, but you have decided to exclude them? Please list and reasons for excluding them.

Full Name	Age of Child	Reasons for Excluding Them

ASSETS & LIABILITIES

27. **Please describe assets & value of assets?** E.g., Freehold property value approx £350,000. Your assets may include freehold / leasehold property, Cash at bank, ISAS bonds, Insurance policies, Pensions Quoted shares ISAs, National saving products, car, jewelry contents, property held in sole name, unit trust. Trust property. **List assets and value**

Asset	Approx Value

Are there any liabilities? E.g., mortgage?

Liability	Amount

FOREIGN PROPERTY

28. Do you own property outside of England & Wales Scotland & Northern Ireland? Yes No

29. If yes, have you made a separate will disposing of this property? Yes No

30. Complete the following details for foreign property

Liabilities	Your Name	Your Partner's Name	Joint Names
Mortgages			
Other Loans / Debts			
Totals			

EXECUTORS

Executors are responsible for collecting in the assets of your estate, paying debts funeral expenses and taxes. They are also trustees to beneficiaries underage. Executors should be people you trust. You should check with them first if they are interested in being appointed in your Will.

You should consider spouse / partner, either alone or jointly with other individuals. It is advisable to appoint at least 2 who can act together in the administration.

You can also consider appointing the Will Writing Services Company to act as your executor particularly if you don't have close friends or family. See question 33 below.

31. Name and addresses of intended executors

Name	Address	Relationship

You should consider appointing an alternate Executors in case partner/ spouse don't want to act or unable to act or predecease you.

32. Name address of alternate/ substitute executors

Name	Address

33. I wish to appoint the Will Writing Services Company as my Executor / Trustee.

GUARDIANS

If you have child or children under 18, it is important to appoint guardians to look after them in case you and the other parents should die, while they are still under age. Both parents should consider making the same choice in their Will. You should ensure the guardian agreement before appointing them in your Will.

34. Name and address of guardians to children under 18

Name	Address	Relationship to You
1		
2		
3		

GIFT OF CASH OR SPECIFIC PERSONAL BELONGINGS

35. In this section you may want to give a specific sum. whether cash or specific item. When giving specific gift you should consider the possibility of the goods not been around when you die and what steps can be taken in your Will to address this eventuality.

Name of Beneficiary	Relationship to You	Amount or Description of item

RESIDUARY ESTATE

36. Please indicate how you wish to leave the residuary estate. Where your residuary estate is to be divided between two or more beneficiaries, it is usually provided that should one of them die before you, his or her share will pass to the surviving beneficiary or beneficiaries. Should one of the children die before you, a Will normally provide for his or her children, your grandchildren, to inherit as substitute beneficiaries. If you do want these provision to be included automatically, you should specify alternative arrangements.

OPTION A

I wish my spouse/partner to inherit in the first instance

Failing that to my children to inherit in equal shares, in the case of those under age 25 at the age specified.

Age children should inherit: 18 21 25 Other _____

OPTION B

I wish my spouse/partner to inherit in the first instance

Failing that the following person or charities to inherit in the shares, in the case of those under age 25 at the age specified below.

Name of Beneficiary	Relationship to You	Percentage Share

Age children should inherit: 18 21 25 Other _____

OPTION C

The following persons or charities:

Name of Beneficiary	Relationship to You	Percentage Share

Age children should inherit: 18 21 25 Other _____

ADDITIONAL INFORMATION

37. Please list any additional / special instructions below:

38. Most clients who decide to make a Will also have a Legal Power Attorney LPA drawn up and executed at the same time. A LPA is a legal document that lets you appoint one or more people (known as 'attorneys') to help you make decisions or to make decisions on your behalf, in the event that you are unable to do so. It gives you more control over what happens to you if you have an accident or an illness and cannot make your own decisions (you 'lack mental capacity').

Would you like more information about a LPA? Yes No

39. Was this form completed by the named applicant providing Will instruction?

Yes No, someone else on my behalf, enter name: _____



Thank you for choosing the Will Writing Company to write your will. If you need to discuss your completed form please feel free to call or email.

info@willwritingservices.com

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