



WILL INSTRUCTION FORM



This form is intended to assist you in preparing for a meeting to discuss your Will requirements or may be used to provide us with instructions for preparing a draft Will without a personal interview.

By its nature the form is generic and tries to cover a whole variety of circumstance. It is not possible to be detailed enough and to provide all the possible permutations to cover each individual's circumstances. So please feel free to complete the form insofar as it is helpful and add your own comments ideas or personal instructions where appropriate.

It is important that we have full and accurate information so please, where possible, give as much detail as you can. This will help us to give you accurate relevant and full advice for your Will.

If you have any questions at all please just ask and we will consider how best we can arrange your affairs to achieve your aims.

PERSONAL DETAILS

Title Mr Mrs Miss Ms Other:

Surname	<input style="width: 95%;" type="text"/>
Forenames	<input style="width: 95%;" type="text"/>
Previous Names	<input style="width: 95%;" type="text"/>
Date of Birth	<input style="width: 95%;" type="text"/>

Address

County **Postcode**

Home Telephone

Work Telephone

Mobile

Email

National Insurance Number

Job Description

Status Single Married Civil Partnership Co-habiting
 Separated Divorced Widowed

	Yes	No
Do you own any assets using any other name or version of your name?	<input type="checkbox"/>	<input type="checkbox"/>
Details <input style="width: 95%;" type="text"/>		

	Yes	No
Are you planning to get married?	<input type="checkbox"/>	<input type="checkbox"/>
Are you planning to enter a civil partnership?	<input type="checkbox"/>	<input type="checkbox"/>
Are you in the process of obtaining a divorce?	<input type="checkbox"/>	<input type="checkbox"/>
Is your spouse/civil partner making a will?	<input type="checkbox"/>	<input type="checkbox"/>
Do you consider England & Wales to be your permanent home?	<input type="checkbox"/>	<input type="checkbox"/>

SPOUSE/CIVIL PARTNER/PARTNER DETAILS

Title Mr Mrs Miss Ms Other:

Surname
Forenames
Previous Names
Date of Birth

Address

County **Postcode**

Home Telephone
Work Telephone
Mobile
Email
National Insurance Number
Job Description

FOR OFFICIAL USE ONLY

MATTER DETAILS

Lead Fee Earner	<input type="text"/>	Description	<input type="text"/>
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CHARGING DETAILS

Cost Estimate or Fixed Fee	<input type="text"/>
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Disbursement	<input type="text"/>	Charge Rate	<input type="text"/>
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RISK PROFILE

Very Low	<input type="checkbox"/>	Low	<input type="checkbox"/>	Moderate	<input type="checkbox"/>	High	<input type="checkbox"/>	Very High	<input type="checkbox"/>
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LETTER HEADING

1.	<input type="text"/>
2.	<input type="text"/>

REFERRER DETAILS

Name	<input type="text"/>	Business Name	<input type="text"/>
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Entity Number	<input type="text"/>	Referral Code	<input type="text"/>
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Note: If the Referrer is not an entity an Entity creation sheet must be completed (source code)

CHILDRENS' DETAILS

First child	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Date of Birth	<input type="text"/>

Second child	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Date of Birth	<input type="text"/>

Third child	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Date of Birth	<input type="text"/>

Fourth child	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Date of Birth	<input type="text"/>

If there are children under the age of 18 consider appointing a guardian or guardians in the event there is no one else with Parental Responsibility

		Yes	No
Do you wish to appoint a Guardian for children under 18?		<input type="checkbox"/>	<input type="checkbox"/>
Guardian's details			
Full Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>

YOUR ASSETS

	Yes	No
Do you own your house?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own your house jointly with another person?	<input type="checkbox"/>	<input type="checkbox"/>
Are you Joint Tenants?	<input type="checkbox"/>	<input type="checkbox"/>
Are you Tenants in Common?	<input type="checkbox"/>	<input type="checkbox"/>
What is the approximate value of your house?	<input style="width: 100%;" type="text"/>	
What is the approximate value of any outstanding mortgage?	<input style="width: 100%;" type="text"/>	
Do you own any other property/properties?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own the other property with another person?	<input type="checkbox"/>	<input type="checkbox"/>
Are you Joint Tenants?	<input type="checkbox"/>	<input type="checkbox"/>
Are you Tenants in Common?	<input type="checkbox"/>	<input type="checkbox"/>
What is the approximate value of your other property(ies)?	<input style="width: 100%;" type="text"/>	
What is the approximate value of any mortgage(s)?	<input style="width: 100%;" type="text"/>	

If you own several properties please provide full details.
 If you own property with different people please provide full details.

	Yes	No
Do you have savings in your sole name?	<input type="checkbox"/>	<input type="checkbox"/>
What is the approximate value of your savings?	<input style="width: 100%;" type="text"/>	

	Yes	No
Do you have savings in joint names?	<input type="checkbox"/>	<input type="checkbox"/>
What is the approximate value of your savings?	<input style="width: 100%;" type="text"/>	

	Yes	No
Do you have stocks and shares?	<input type="checkbox"/>	<input type="checkbox"/>
What is the approximate value of your stocks & shares?	<input style="width: 100%;" type="text"/>	

	Yes	No
Do you own any individual items of particular value?	<input type="checkbox"/>	<input type="checkbox"/>
Please give details	<input style="width: 100%;" type="text"/>	
	<input style="width: 100%;" type="text"/>	
	<input style="width: 100%;" type="text"/>	

Do have any pets?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Do you have any business interests	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Sole Trader details	<input type="text"/>	
Partnership details	<input type="text"/>	
LLP details	<input type="text"/>	
Company details	<input type="text"/>	

Do you own any property abroad	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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Please give details of any other assets and their monetary value
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Liabilities			
	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Do you have an overdraft?	<input type="checkbox"/>	<input type="checkbox"/>	Value <input type="text"/>
Do you have any loans?	<input type="checkbox"/>	<input type="checkbox"/>	Value <input type="text"/>

WILL CONTENT

Do you wish to be: **buried** **cremated** **other**

You need to appoint someone who you trust to administer your estate after your death. We recommend you appoint at least two executors. You can appoint Executors together or Executors to substitute if an appointed can't act. Beneficiaries can also be Executors. You can appoint Bell & Buxton to act as professional Executors.

First Executor	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>

Second Executor	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>

Third Executor	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>

Fourth Executor	
Full Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>

	Yes	No
Do you want to give your personal possessions to your Executors to distribute according to any instructions you give them?	<input type="checkbox"/>	<input type="checkbox"/>

You can make gifts in your Will to individuals or organisations, such as charities. Please give as much detail as possible.

Specific Gifts		
Item	To	Full Name
		Address

Item	To	Full Name
		Address

Item	To	Full Name
		Address

Item	To	Full Name
		Address

Item	To	Full Name
		Address

If you make specific gifts of identified items then that gift will fail if you do not own that item at the time of your death.

You can make legacies (cash gifts) to anyone you wish including organisations such as charities. These may be to groups, eg “my grandchildren” in which case you need to decide whether you are making a gift to be shared by the group or of a certain amount to each member of the group. Legacies can be fixed amounts or refer to some other value, eg 1/10th, or 10% of my net estate.

Amount		Legacies	
£	To	Full Name	Address
<input type="text"/>		<input type="text"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Amount		Legacies	
£	To	Full Name	Address
<input type="text"/>		<input type="text"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Amount		Legacies	
£	To	Full Name	Address
<input type="text"/>		<input type="text"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Amount		Legacies	
£	To	Full Name	Address
<input type="text"/>		<input type="text"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Amount		Legacies	
£	To	Full Name	Address
<input type="text"/>		<input type="text"/>	<input type="text"/>
			<input type="text"/>
			<input type="text"/>

Gifts to children, under the age of 18, will be held in trust by the Executors until the children reach the age of 18 (or older if you decide). You can include explicit Trust arrangements for various reasons, for example the circumstances of the beneficiary suggest it would not be in their interests or they may not be able to cope with dealing with the gift themselves. There are a variety of Trust arrangements and we can discuss these with you.

After the transfer of specific gifts and the payment of legacies who do you want to receive your residuary estate?

If you want your residuary Beneficiaries to simply share the Residuary Estate equally then you do not need to specify a percentage.

Residuary Beneficiary	
% Share	Full Name
To	
	Address

% Share	Full Name
To	
	Address

% Share	Full Name
To	
	Address

% Share	Full Name
To	
	Address

% Share	Full Name
To	
	Address

% Share	Full Name
To	
	Address

If you have named all individual persons to be your residuary Beneficiaries then you need to consider what might happen if they die before you. The usual arrangement is that if they have children then their children would inherit alternatively you can have other people or organisations to take by way of substitution.

% Share		Substitute Residuary Beneficiary	
		Full Name	
<input type="text"/>	To	<input type="text"/>	
		Address	
		<input type="text"/>	
		<input type="text"/>	

% Share		Full Name	
<input type="text"/>	To	<input type="text"/>	
		Address	
		<input type="text"/>	
		<input type="text"/>	

% Share		Full Name	
<input type="text"/>	To	<input type="text"/>	
		Address	
		<input type="text"/>	
		<input type="text"/>	

% Share		Full Name	
<input type="text"/>	To	<input type="text"/>	
		Address	
		<input type="text"/>	
		<input type="text"/>	

% Share		Full Name	
<input type="text"/>	To	<input type="text"/>	
		Address	
		<input type="text"/>	
		<input type="text"/>	

ADDITIONAL INFORMATION

	Yes	No
It may be appropriate to consider using a Trust in your Will in order to protect your assets or your intended beneficiaries		
Do you want information about using Trusts as part of Will planning?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want information about Inheritance Tax Planning including Business Property Relief and Agricultural Property Relief?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to consider options relating to the cost of care for the elderly?	<input type="checkbox"/>	<input type="checkbox"/>

LASTING POWERS OF ATTORNEY

	Yes	No
Lasting Power of Attorney are special documents that allow your chosen family members or friends to assist either with your financial affairs or with you health and welfare should you become unable to manage matters yourself. Among other things they protect you from unwarranted and often costs interference form the state.		
Do you want more information about Lasting Powers of Attorney	<input type="checkbox"/>	<input type="checkbox"/>