

Will Instruction Form

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 your will.

Some of these questions may seem inappropriate to your particular case, but experience shows that the answers can be important, so please try to complete the form in full. 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 married couples or couples living together, should make a will at the same time. If their wills are not similar, there can be surprising and unfortunate results in the event of both partners dying together. Unless there is no conflict of interest, it is permissible for us to deal with both parties 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

First names _____ Surname _____

Full postal address _____

_____ Post code _____

Your date of birth

D	D	M	M	Y	Y	Y	Y
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Contact telephone numbers:

Home _____ Mobile _____

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

Email address _____

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

- | | |
|--|---|
| <input type="checkbox"/> Married and living together | <input type="checkbox"/> Civil Partner |
| <input type="checkbox"/> Unmarried and living together | <input type="checkbox"/> Unmarried and living alone |
| <input type="checkbox"/> Widowed | <input type="checkbox"/> Married but separated |
| <input type="checkbox"/> Divorced | <input type="checkbox"/> Single |

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

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.

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 you do not have a wife, husband or partner, OR if your wife, husband or partner dies first, OR if you have answered No to the previous question:

Do you want to leave any cash legacies (eg to friends, relatives or charities, etc)? Example: You want to leave your sister the sum of £500 - please give her name, address and amount.

Yes No

If yes, please give details _____

Do you wish to make any gifts of specific items to friends, relatives or charities, etc? Example: You want to leave your brother your gold watch - please give his name, address and item.

Yes No

If yes, please give details _____

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, accounts, 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.

Yes, I would like Naughtons to act as Executors

If you want to name other executors, please name them below.

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. In particular, give details if any of your assets are outside England and Wales. (The list below is not necessarily complete; please include any other categories.

Nature of asset	Total Value
Land and buildings	
Listed stocks and shares	
Bank and building society accounts (taken together as one lump sum)	
Life Insurance	
Valuable possessions (eg cars, jewellery, pictures, silver)	
Pension policies	
'Death in Service' benefits	
Business assets	
Savings	
Jewellery	
Antiques	
Motor vehicles	
Nature of liability	Total Value
Mortgages	
Tax liabilities	
Debts	

Have you made any substantial gifts over the last 7 years (more than £3000 in any tax year)?

Yes No

If yes, please give details _____

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.

Yes No

If yes, please give details _____

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

Yes No

If yes, please give details _____
