

Stages of writing your will

Terms of Business and Aide Memoire

When you first make contact with us regarding the preparation of your will you will be provided with our terms of business and an aide memoire. The aide memoire is provided so that you may list relevant details regarding your assets and to save time in providing names and addresses of those you wish to include in your will. It also allows you time to consider what you wish to do.

You may wish to make an appointment to attend one of the solicitors when you make this first contact or alternatively when you have received and considered the documents referred to above.

Meeting

When you meet with one of our solicitors we will review the aide memoire and discuss with you the value of your estate and how the assets are owned. We will discuss your wishes and consider potential Inheritance Tax savings and protection of assets from future care home fees where appropriate.

We will run through the stages of your will and take your instructions and provide guidance where required. We will also raise the question regarding storage of your original will, please refer to our terms of business for more information.

This meeting is likely to last 30 mins - 1 hour depending on the complexity of your estate. We will be able to confirm the appropriate fixed fee to your will at this meeting.

Draft Will

After our meeting we will write to you detailing the discussions and agreed action at our meeting and will provide you with a draft will for your approval.

If there is any further information we require from you we will request this in our letter.

Signing

Once the draft will is approved it will be necessary for you to make an appointment to attend the office to deal with the signing of an engrossed version. We will be able to provide witnesses for this signing. The storage of the signed version of the will should be agreed at this stage.

If the original will is to be retained at this office we will provide you with a copy for your records at home.

Our bill will then be rendered.

Aide memoire for wills

This document is to enable you, the will maker, to gather all the basic information together which is required for me to prepare your will. Please complete with us much information as possible, obtaining this all prior to us meeting will both save time and costs.

For information purposes how did you hear about us?

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(1) WILL MAKER

Full name (inc. middle names)

Address

Telephone number

Date of birth

Have you already made a will? YES/NO

Where is this kept at present?

Do you have a funeral plan in place?

(2) SPOUSE, CIVIL PARTNER AND ANY CHILDREN/STEP-CHILDREN (please specify)

Full name (1)
[Spouse/Civil Partner]

Date of birth

Are you making a will with your spouse/civil partner at the same appointment? YES/NO

Are you willing to give instructions in the presence of each other? YES/NO

If yes then please be aware that:

- (a) If a conflict of interest arises we may not be able to continue to act for both or either of you.
- (b) We will not accept instructions to make subsequent significant changes to the will of one spouse/civil partner without the knowledge of the other (unless the other lacks mental capacity)

Full name (2)
[Children]

Address

Full name (3)
[Children]

Address

Full name (4)
[Children]

Address

Any others:

(3) EXECUTORS (people who will administer the estate)
(They can be beneficiaries)

Full name (1)

Address

Full name (2)

Address

Any others:

(4) GUARDIANS OF ANY INFANT CHILDREN

Full name (1)

Address

Full name (2)

Address

(5) BENEFICIARIES TO BE NAMED IN THE WILL

Name(s)	Address(es)	Proposed gift ie: legacy or share of estate
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1.

2.

3.

4.

(please continue if necessary on the spare back sheet)

(6) THE VESTING AGE

The date at which your infant children/grandchildren would benefit from your will - 18, 21 or 25 years

(7) **'GLOBAL ACCIDENT'**

You should consider what you would wish to happen in the event of your immediate family dying in a 'global accident'. You can either name more remote relatives or choose a charity.

Detail:

(8) **PETS/LIVESTOCK**

Have you considered making any provision for the care of any pets or livestock you may own?

(9) **SIZE OF ESTATE**

It is important that you are aware of the size/value of your estate; we would recommend that you jot basic details down below:

Stocks and shares:

Bank accounts/building societies:

Consideration should be given to internet based products; will your executors be able to access these accounts? Have you recorded passwords anywhere?

National Savings products i.e.: premium savings bonds:

Life insurance policies:

Other forms of savings and joint assets:

Death in service benefits:

Value of private company/self-employment partnership:

Value of furniture, cars, jewellery and other 'chattels':

Value of your property: joint names or tenants in common?

Any mortgage outstanding (is this covered by endowments?):

Any foreign assets i.e. French chateau, Spanish villa, Jersey bank account?

Have you agreed to leave any part of your property to any other party when you die?

Do you expect to inherit any assets in the future?

Have you made any lifetime gifts in the last seven years or do you expect to do so?

CONTINUATION SHEET/NOTES