

ADAMS & REMERS

SOLICITORS

WILL INSTRUCTION BOOKLET

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This form will provide us with most of the information required to draft a Will for you. It will also reveal what special arrangements are advisable to meet your needs. This form will provide the basis for future discussions and is not intended to be a legal document. If there is insufficient space on this form, please use a separate sheet of paper.

PERSONAL DETAILS

YOU

Full names:

Any other names
In which you have assets:

Address:

Date & Country of Birth:

Telephone numbers:
(Home)

E-mail:

SPOUSE OR PARTNER

Full names:

Any other names
in which you have assets:

Date & Country of Birth:

(Work)
(Mobile)

Do you have a spouse or partner with whom you are living?

YES/NO

Are you married?

YES/NO

If "NO", are you intending to marry in the near future?

YES/NO

DETAILS OF CHILDREN (including those of any spouse/partner)

Please identify clearly children by any previous marriage or relationship.

Full Names of Children

Address(es) (if different from your own)

Ages

DEPENDANTS (including those of any spouse/partner)

The law enables certain categories of potential claimants to apply to the Court for reasonable financial provision from a deceased person's estate. The position should be evaluated when making a Will. Please give details of any person(s) in the categories listed below:

- (a) Your (or your partner's) spouse if you are separated or in the process of divorcing:
- (b) Your (or your partner's) former spouse who has not remarried:
- (c) Any person being wholly or partially maintained by you (or your partner). There is no need to mention children whose details have been set out in the previous section:

DETAILS OF ASSETS AND LIABILITIES

Please indicate below (to nearest £1,000) the present value of assets held and outstanding liabilities by reference to the name in which they are held. If you are not sure of the amounts, please give estimates. This will help us to give advice as to what provision to make in the Will to minimise the impact of inheritance tax.

<i>Assets</i>	<i>Your name</i>	<i>Your partner's name</i>	<i>Joint names</i>
Freehold/Leasehold property	£ _____	£ _____	£ _____
Household and personal effects (including jewellery and cars)	£ _____	£ _____	£ _____
Cash at banks and building societies	£ _____	£ _____	£ _____
National Savings Certificates/ Premium Bonds	£ _____	£ _____	£ _____
Quoted stocks, shares and Unit Trusts, PEPs and ISAs	£ _____	£ _____	£ _____
Business interests (sole trader)	£ _____	£ _____	£ _____
Partnership property	£ _____	£ _____	£ _____
Unquoted stocks and shares	£ _____	£ _____	£ _____
Agricultural property	£ _____	£ _____	£ _____
Foreign assets	£ _____	£ _____	£ _____
Interests under Trusts	£ _____	£ _____	£ _____
Loans repayable to you	£ _____	£ _____	£ _____
Other assets	£ _____	£ _____	£ _____
TOTALS	£ _____	£ _____	£ _____

Liabilities

Mortgages	£ _____	£ _____	£ _____
Other loans and debts	£ _____	£ _____	£ _____
TOTALS	£ _____	£ _____	£ _____

DETAILS OF INSURANCES AND PENSIONS

Please provide details of any insurances or other sums payable on your death, any trusts on which they are written, and if they are related to any borrowings

	Your Name	Your Partner's Name	Joint Names
Endowment Insurance			
Term Insurance			
Whole Life Insurance			
Death in Service Benefit			
Pension Policies			

DETAILS OF EMPLOYMENT AND OTHER INCOME

Please provide us with particulars of your income.

	Your Name	Your Partner's Name
Employment Income		
Investment and Savings Income		
Pension Income		

OTHER USEFUL INFORMATION

	You	Your Partner
Employer		
Accountant		
Insurance/Pensions Adviser		
Investment Manager		

GIFTS OF CASH OR SPECIFIC PERSONAL BELONGINGS

Before deciding to whom the main part of your estate should be left, you may wish to consider making gifts of cash or specific personal belongings.

*Full names and addresses
of beneficiaries*

*Relationship to you
(if any)*

*Amount (£) or
description of item*

In the case of Wills for couples, please tick one box only to indicate whether cash legacies are to be paid under each Will, or once only on the first or second death:

Legacies under each Will

Legacies only on first death

Legacies only on second death

GIFTS OF PERSONAL BELONGINGS NOT MENTIONED ABOVE

We can insert a provision leaving all your personal chattels to individuals with the request that they be distributed in accordance with any wishes expressed in a letter or memorandum. This is a very flexible arrangement, as you can change your letter of wishes as often as you like, without having to make a new Will or Codicil. Such requests are not legally binding; however, provided you have full confidence in the individuals, it is unlikely that your wishes would be ignored and this is often the most practical and economical way of meeting your requirements.

Please confirm that you are happy for your personal effects to be dealt with in this way by ticking the box:

Name of individual(s):

RESIDUARY ESTATE

You must decide to whom you wish to leave the remainder of your estate.

Please indicate your wishes by ticking either option (a) or by completing option (b)

(a) I wish my spouse/partner to inherit in the first instance. Failing that, I wish my children to inherit in equal shares at the age (in the case of children under 25) specified below.

18

21

25

Other

Should one of your children die before you do you want his or her children (your grandchildren) to inherit as substitute beneficiaries. Please tick this box if you are happy with this arrangement, or indicate alternative provisions.

*** IMPORTANT NOTE:** *Unless the Will expressly indicates a contrary intention, the word "children" includes adopted and illegitimate children but does **not** include stepchildren.*

(b) I wish the following to inherit as specified below:

*Full names and addresses
of beneficiaries*

*Relationship to you
if any*

*%
share*

*Age at which
to inherit*

ENDURING POWER OF ATTORNEY INSTRUCTIONS

We strongly recommend that you consider signing Enduring Powers of Attorney when making Wills. Please ask for our information sheet available on request. This is a practical way of ensuring that your financial affairs are dealt with in the event of mental or physical incapacity occurring through accident, illness or old age.

If you would like us to prepare Enduring Powers of Attorney, please provide the full name(s) and address(es) of the Attorney(s). We recommend that in most cases two or more Attorneys should be appointed and that they should be able to act jointly and severally on your behalf in relation to all your property and affairs.

Because of the far-reaching nature of Enduring Powers of Attorney, they are not something that should be done without first obtaining proper legal advice. We will not prepare Enduring Powers of Attorney without giving the necessary advice to you at a meeting.

Full names of Attorney(s) *Address(es)*

1.

2.

3.

* Please ensure that you have given us your date(s) of birth in the Personal Details section.

ADDITIONAL INFORMATION

Please use this space to provide us with any additional information you feel may be relevant to your personal circumstances.

SIGNED: _____

DATED: _____

SIGNED: _____
(spouse/partner)

DATED: _____

Please return the Instructions to us, or bring them with you to your appointment.

In accordance with the Data Protection Act 1999, any information provided on this form will be collected and held by us and will not be released to a third party without your consent unless we are legally obliged to do so. It will be used solely for the purposes of advice including the preparation of your Will and/or Enduring Powers of Attorney.