

***ANDERSON LONGMORE & HIGHAM
WILL INSTRUCTION FORM***

**Please complete as fully as possible and return to us.
(See Notes on Page 6 for assistance)**

**ATTACH
FEE EARNER'S
BUSINESS CARD**

WILL INSTRUCTIONS

(1) YOUR DETAILS:

Title:	<input type="text"/>
Full Christian Names:	<input type="text"/>
Surname:	<input type="text"/>
Full Address: Including Postcode	<input type="text"/>
Telephone No.	Work – Home – Mobile –
Email Address:	<input type="text"/>
Date of Birth:	<input type="text"/>
Place of Birth:	<input type="text"/>
National Insurance Number	<input type="text"/>

(2) FAMILY DETAILS:

i) **Husband/Wife/ Registered Civil Partner** – *(please mention any other partner you live with and any former husband, wife or Civil Partner who is still alive)*

Full Name:

Are you married to each other
or if appropriate, has your civil
partnership been registered?

YES

NO

If so, please give date of marriage

ii) **Details of any LIVING former Spouse or Civil Partner –**

Full Name:

iii) **Children –**

Full Name: Age:

Full Name: Age:

Full Name: Age:

iv) **Step-Children**

Full Name: Age:

Full Name: Age:

Full Name: Age:

If any of the above are disabled, please state which person and the current nature of their disability

v) **Please list anyone dependent upon you (apart from husband/wife/partner/children) e.g. an elderly relative. Please give details of the person and the nature of their dependency.**

(3) FINANCIAL DETAILS: (Please include everything)

i) ASSETS

(a) In the JOINT Names of you and any other person

Bank, Building Society or other Savings Accounts:	Total Balance in ALL Accounts £
Life Policies	Approximate Value £
Any Other Monetary Assets	Approximate Value £
Contents of Property & Personal Effects	Approximate Value £
Property (House, Flat etc.)	Approximate Value £
Property (1) Full Address & Postcode	
Property (2) Full Address & Postcode	

In relation to the Property(ies) above:

Who is/are the joint owners?	
Is/are the Property(ies) owned jointly as:	Joint Tenants <input type="checkbox"/> Tenants in Common <input type="checkbox"/> Don't Know <input type="checkbox"/>
<i>If you are not sure, this will be explained. It is important so please ask for an explanation.</i>	
Is any BUSINESS owned? If YES specialist advice is recommended. Do you require it?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Any Overseas property owned? If YES, in which country?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Have you made a foreign Will? If YES, in which country?	YES <input type="checkbox"/> NO <input type="checkbox"/>

ASSETS Contd.

(b) In your SOLE Name

Bank, Building Society or other Savings Accounts:	Total Balance in ALL Accounts £
Life Policies & Pension/s	Approximate Value £
Any Other Monetary Assets	Approximate Value £
Contents of Property & Personal Effects	Approximate Value £
Property (House, Flat etc.)	Approximate Value £
Property (1) Full Address & Postcode	
Property (2) Full Address & Postcode	

Is any BUSINESS owned? If YES specialist advice is recommended. Do you require it?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Any Overseas property or Assets owned? If YES, in which country?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Have you made a foreign Will? If YES, in which country?	YES <input type="checkbox"/> NO <input type="checkbox"/>

ii) FINANCIAL LIABILITIES:-

Mortgage/s: Repayment <input type="checkbox"/> Endowment <input type="checkbox"/>	Approximate amount outstanding £
Personal Loan/s or Credit Agreement/s:	Approximate amount outstanding £
Hire Purchase Agreement/s:	Approximate amount outstanding £
Any other Liabilities:	Approximate amount outstanding £

(4) **WILL DETAILS**

i) **Funeral Wishes**

Cremation

Burial

Other Please specify

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ii) **Executors** – Please give the details of the people whom you would like to specify as Executors. You can choose up to four, though it may complicate the administration of your estate to have so many. If you need space for more than two, please mark the page “PTO” and continue on the back.

NB: There is no rule preventing a beneficiary from being an Executor, though there may sometimes be reasons why this is not recommended.

(a) <u>Full Name:</u>	Relationship if any
Full Address:	
(b) <u>Full Name:</u>	Relationship if any
Full Address:	

iii) **Guardians (for children under 18)** – Please give the name, address and relationship (if any) of the person/s whom you wish to take responsibility for any children you have if they should be left as orphans.

(a) <u>Full Name:</u>	Relationship
Full Address:	

(b) <u>Full Name:</u>	Relationship
Full Address:	

iv) Persons to Benefit from your Estate

- (a) If you are married or in a long term relationship do you wish to leave all or most of your estate to your husband/wife/partner? YES NO
If YES, please set out any gifts you wish to make **BEFORE** the rest of your Estate is given to your Husband/Wife/Partner in the box below or on a separate sheet

- (b) If your husband/wife/partner dies **BEFORE** you, or if the answer to (a) above is NO, do you wish your Estate to pass to your children? YES NO

If YES, at what age do you wish them to inherit? 18 21 25 Other
(There may be Inheritance Tax implications depending on the age specified)

- (c) If any child of yours dies before inheriting do you wish your child's share of your Estate:

i) To pass to your child's own child or children?

If so, at what age do you wish them to inherit? 18 21 25 Other
(There may be Inheritance Tax implications depending on the age specified)

OR

ii) To be shared between your surviving child/children?

If so, at what age do you wish them to inherit? 18 21 25 Other
(There may be Inheritance Tax implications depending on the age specified)

- (d) If (a), (b) & (c) do not apply (or if the persons named in (a), (b) & (c) above have all died (e.g. in an accident), to whom would you wish your Estate to pass?

This is not a pleasant thing to consider but where there is a family with young children and the family travels together, consideration should be given to this point. Please set out your wish in the box below or on a separate sheet of paper.

- (e) Do you wish to make any gifts, either money or a specific possession, which are not already mentioned above, e.g. to relations, friends, godchildren, nieces, nephews or charities? YES NO

If YES please given details in the box below or on a separate sheet.

This Form should be fairly easy to complete, but these notes may be of some help.

Previous Wills

If you have made a Will previously, then sending a photocopy to us would be helpful but is not essential. Even if you have not made a previous Will a revocation clause will be inserted in your Will as a precaution.

Family Details

If you are married, cohabiting, in a civil partnership (or supporting your spouse/civil partner), or you have children, then information on them is important, especially if you are not leaving them anything.

Claims Prevention

To help try and prevent any claims against your Estate it is important to know if you financially support or are morally obliged to anyone (such as spouses, civil partners, lovers and children) not provided for in the Will.

Financial Details

This information is needed to gauge the size of your Estate. Your Estate is everything you own at the date of your death. The figures do not have to be exact. In the event of a death in the tax years 2009/2010 or 2010/2011, you can leave up to £325,000 in your Estate before Inheritance Tax has to be paid at 40% on the excess above that.

Funeral Wishes

These are not strictly necessary but your Will is a convenient place to state your wishes, especially if there could be a dispute about them on your death. You can simply say you wish to be buried or cremated or you can give more extensive instructions.

Executors

These are the people that administer your Estate after your death and see that the terms of your Will are carried out. In over 9 out of 10 cases Executors employ solicitors to administer and wind up an Estate for them. Anybody over the age of 18 can be an Executor but it makes sense to appoint a UK resident and someone younger than you. You can have up to four Executors but in most cases one will do. You should appoint a substitute to act if your chosen Executor dies before or at the same time as you. If you are spouses/civil partners or just long term partners leaving everything or most to each other, it is sensible to appoint each other.

NB: Anderson Longmore & Higham can act as executor or co-executor if you wish.

Guardians

If you have children then you can appoint a Guardian to exercise your parental rights after both parents have died.

Persons to benefit (Beneficiaries) from your Estate

Tell us if you wish to leave all or most of your Estate to your husband/wife or partner.

Gifts

These are also called legacies or bequests and can be of anything in your Estate. However, please describe the object or sum precisely. For instance, it is no good leaving someone your gold watch if, when you die, you have three slightly different gold watches; it will not be known which one you mean and a dispute can arise.

Residue

There has to be a sweeping up clause to catch everything not otherwise given away in your Will. Indeed you may not have made any gifts at all and your "Residuary Estate" may all be going to one person or a charity. You can leave your residue between several people either equally or in specified proportions. Again, as with Executors, if you are leaving all your residue to one person it is better to name a substitute to receive the residue if the first named person dies before you.

Other Relevant Information

The Will Instruction form covers nearly everything a solicitor will need to know in order to prepare your Will. However, if you have very special personal circumstances you think may be important, please state them on a separate sheet.

And Finally

If you have any difficulty please do not hesitate to contact us.