

MAKING A WILL

When making a Will there are various matters for you to consider and information for you to provide to your Solicitor in order for your Last Will and Testament to be drafted.

Detailed below is a list of the kind of things for you to consider when planning a Will, which we hope will be of assistance to you in advance of your appointment. However, if you are unclear about anything then please do not worry as it will be fully discussed during your appointment with your Solicitor.

1. Executors

This is the person or people who administer your estate, meaning they collect in all of your assets and from that pay off any debts, funeral expenses or inheritance tax and distribute the remaining amount to your beneficiaries according to the terms of your Will.

Executor 1

Full name:

Address:

Executor 2

Full name:

Address:

2. Guardians

This is the person or the people you can appoint to take care of your infant children, usually up to the age of 18 years, in the event there are no parents or anyone with parental responsibility able to do so.

Full name:

Address:

Full name:

Address:

3. Specific Gifts

Do you wish to give particular gifts away such as jewellery or furniture, etc. A full description of the item and the name of the person it is to pass to and their address is required.

Description of the item:

Full name of beneficiary:

Address of beneficiary:

4. Monetary Gifts

Do you wish to give away an amount of money to someone or to a charity?

Amount of gift:

Full name of beneficiary:

Address of beneficiary:

5. Residuary Estate

After all debts, expenses, taxes and any monetary gifts have been paid out the remaining amount is called the residuary estate and you need to state who this is to pass to and whether or not it is to be divided in equal or unequal shares. There can be one or more beneficiaries.

Beneficiary 1

Full name:

Address:

% share:

Beneficiary 2

Full name:

Address:

% share:

Beneficiary 3

Full name:

Address:

% share:

Beneficiary 4

Full name:

Address:

% share:

6. Funeral Arrangements

You may wish to state if you prefer burial or cremation.

We look forward to seeing you at your appointment.