Oliver's Wills Ltd

PRIVATE AND CONFIDENTIAL

Testamentary Instructions- short version

# Client Details

|  |  |
| --- | --- |
| Client 1 | Client 2 |
| Title | Mr / Mrs / Miss / Ms / Dr | Title | Mr / Mrs / Miss / Ms / Dr |
| First Name(s) |  | First Name(s) |  |
| Surname |  | Surname |  |
| Do you use any other names? |  | Do you use any other names? |  |
| Address |  |  Postcode |  |
| Telephone (Home) |  | Telephone (Home) |  |
| Telephone (Work) |  | Telephone (Work) |  |
| Telephone (Mobile) |  | Telephone (Mobile) |  |
| Email |  | Email |  |
| Date of Birth |  | Date of Birth |  |
| Marital status | Marital status |
| Profession |  | Profession |  |
| Employer/business name  |  | Employer/business name  |  |

Notes

# Client Background

|  |  |
| --- | --- |
| Have you got an existing Will? | No/Yes /Why change? |
| Do you have any children? If Yes, their ages. | No/Yes |
| Do any of them live at home? |  |
| Have you been married before? | No/Yes |
| Have you any children by another partner? | No/Yes |
| If Yes, is maintenance paid to either ex wife or the children? | No/Yes |
| If Yes, How much maintenance and for how long is it payable? | No/Yes £ per month for years |
| Do either of you have assets held in another name? | No/Yes |
| Do you own any assets outside of England + Wales? | No/Yes |
| Are you in business / have your own company etc? | No/Yes Self Employed/Partnership/Director |
| If Yes, would the business continue after your death? How? | No/Yes |
| Is the home in sole/ joint names or tenants in common? Sole/Joint/TIC | Owned/Mortgaged/Rented? |
| If mortgaged, is there a life insurance to repay debt? If yes, is this life assurance in trust? | No/Yes No/Yes/Don’t Know |
| If owned where are the deeds held? |  |
| Do you need a will at short notice? If yes by what date? | No/Yes |

# Assets and liabilities

Please list the main assets you own. The figures only need to be an estimate and help me to advise on inheritance tax issues or planning issues.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Client 1 | Client 2 | Joint |
| Main residence |  |  |  |
| 2nd property |  |  |  |
| Cash |  |  |  |
| Non cash investments |  |  |  |
| Household Goods Jewellery/car |  |  |  |
| Mortgage Life Insurance  |  |  |  |
| Family Insurance |  |  |  |
| Work death in service |  |  |  |
| Critical Illness |  |  |  |
| Part share of property etc |  |  |  |
| Foreign Assets |  |  |  |
| Other |  |  |  |
| Gifts made in the last 7 years |  |  |  |
| Notes about assets: |

# Liabilities

|  |  |  |  |
| --- | --- | --- | --- |
| Mortgages |  |  |  |
| Personal Loans |  |  |  |
| Credit Cards |  |  |  |
| Funeral Expenses – Estimate |  |  |  |
| Other debts |  |  |  |
|  |  |  |  |
| Total Liabilities | **£** | **£** | **£** |
| Total Assets Less Liabilities | **£** | **£** | **£** |
|  |

# RESIDUARY ESTATE – who benefits on first death?

If you are making a will with someone else (spouse or partner) – do you want them to inherit all your estate on your death, and vice versa? Yes / No

If no, then put down who you want to benefit below.

If yes, then who will be next to benefit if you both die (e.g. children or other relatives) – please put their full names and addresses below.

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |

Are any of the above named beneficiaries under the age of 18? **Yes/No**

If Yes, at what age do you want the beneficiaries to inherit their share?………………… **years**

# RESIDUARY ESTATE – who should inherit if your first beneficiary hAs died?

If everyone has died in the page above, then who should inherit your estate next (for example siblings or nephews/nieces)? Please put their details below.

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  | Share to inherit |  |
|  |  |

Are any of the above named beneficiaries under the age of 18? **Yes/No**

If Yes, at what age do you want the beneficiaries to inherit their share?………………… years

**Notes:**

# SPECIAL GIFTS AND LEGACIES

|  |
| --- |
| Do you want to make any gifts? If yes who to and what is the gift? E.g. All my jewellery to my daughters. |

# APPOINTMENT OF EXECUTORS AND TRUSTEES

If a couple, do you want to be executors for each other’s Wills? **Yes/No**

If No, or if Single Will, who do you want as executors? Executors will organise everything after your death and deal with the distribution of your assets, your funeral and other essential matters.

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

We will also discuss trustees. Even with the simplest will you should appoint at least two trustees (who can also be the executors and beneficiaries if you want). If they are different to the executors however, put their details below. Trustees are the people who hold your money longer term if it can’t be given immediately (e.g. for young children) or if they are managing a property not given as a gift but for someone’s lifetime for example:

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

# APPOINTMENT OF GUARDIANS

Your guardians look after your children under 18 and you are giving them parental responsibility. You may have a first guardian and then one or more reserves.

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Full Name |  | Relationship to Client 1 |  |
| Address |  | Relationship to Client 2 |  |
|  |  |  |

# Funeral Arrangements

Do you want to be cremated or buried?

What other instructions do you want to have, if any?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Other concerns?

Please tick if you are thinking of, or have any concerns or questions about the following:

Nursing home fees □

Inheritance tax □

Ensuring someone can look after your affairs if you are unable to (i.e. Lasting Power of Attorney) □

Anything else? □

It will be very useful to complete as much as you can prior to the meeting but if not it will not be a problem, and all the details can be taken at the first meeting.

**I/we confirm that the information provided is to the best of my/our knowledge correct and will be used as the basis of any advice, recommendations and documents provided.**

|  |  |
| --- | --- |
| Client 1 | Client 2 |
| Date | Date |

Please have ready the following documents as well:

If we are meeting at your home please provide one form of ID such as a passport or driving licence (photocard).

If you are coming to our office please bring two forms of ID including one dated in the last 3 months with your name and address (e.g. utility bill).

Thank you for getting this information ready, but do not worry if you don’t have time or can’t complete it all.