

Will Preparation Form

(for Individual or Couple)

About You

About Your Partner (couples only)

Full name & title:	Full name & title:
Date of birth:	Date of birth:
Postal address:	Postal address:
Postcode:	Postcode:
Email:	Email:
Phone:	Phone:
Marital status:	Marital status:
British citizen: Yes / No	British citizen: Yes / No
Children: Yes / No If yes, their names please:	Children: Yes / No If yes, their names please:
Funeral wishes (if any):	Funeral wishes (if any):

Executors

Dealing with Your Estate

You may appoint up to 4 executors, who may be family, your children (preferably adults), friends, professional advisers or Barr Ellison. If a couple, you can have the same executors.

Would you like your Partner to deal with your estate when the first of you dies? Yes / No / not applicable	
Executor name: Date of birth: Address: Postcode:	Executor name: Date of birth: Address: Postcode:
Executor name: Date of birth: Address: Postcode:	Executor name: Date of birth: Address: Postcode:

Guardians

Legal guardians for children

You may appoint legal guardians for any of your children who are under 18 years when you die. It is sensible to appoint someone who is independent of the administration of your estate. You may appoint more than one guardian and you may appoint guardians in substitution.

Guardian name: Date of birth: Address: Postcode:	Guardian name: Date of birth: Address: Postcode:
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Lasting Power of Attorney

Would you like any of the people mentioned above to be appointed as your Attorney(s)? Yes / No - If yes, state who:
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Gifts

Name(s) in full:	Amount:	Address(es):

Distributing Your Estate

Your estate net of all lifetime debts, taxes, funeral and administrative costs is known as your residuary estate. Your assisting solicitor will discuss this with you in detail. However, if you are clear as to how you would like your estate distributed, then let us know here. (For example, you may wish to leave your residuary estate to family members in equal shares.)

Beneficiary Details

Name(s) in full:	Relationship to you/your partner:	Address(es):

Portfolio of Assets, Gifts & Liabilities

Wherever possible, provide estimates of the current value of your assets, gifts and liabilities.

For couples, where assets or liabilities are joint, please enter % share owned by each.

Assets

<i>Asset type:</i>	<i>Estimated value:</i>	<i>% by You:</i>	<i>% by Partner:</i>
Home / Residence			
Other property / land			
Bank & Building Society Accounts			
Investments			
Stocks & Shares			
Business Assets			
Chattels such as jewellery, art, etc.			
Life insurance / assurance			
Foreign property, if any			
Other assets (e.g. pensions)			

Gifts

Please list any gifts of over £3,000 in any one tax year, which have been made in the last seven years.

<i>Name of donee(s):</i>	<i>Date:</i>	<i>Estimated value:</i>	<i>% by You:</i>	<i>% by Partner:</i>

Liabilities

<i>Liabilities:</i>	<i>Estimated value:</i>	<i>% by You:</i>	<i>% by Partner:</i>
Mortgage			
Any other loans			
Overdraft(s)			
Other liabilities			