

Adams & Remers

A&R. Will Instruction Booklet



A Will is your chance to decide what should happen to your property on your death and who is to inherit what you leave behind and how.

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

SPOUSE (INCLUDING CIVIL PARTNER) OR PARTNER

Full names:

Full names:

Any other names in which you have assets:

Any other names in which you have assets:

Address:

Address:

Date & Country of Birth:

Date & Country of Birth:

Telephone numbers:
(Home)

Telephone numbers:
(Home)

(Work)

(Work)

(Mobile)

(Mobile)

E-mail:

E-mail:

Occupation:

Occupation:

Do you have a spouse or partner with whom you are living? YES NO

Are you married (including in a civil partnership)? YES NO

If so, have you entered into a pre-nuptial agreement? YES NO

If “NO”, are you intending to marry in the near future? YES NO

If you are a widow/widower, how did your spouse’s estate pass on their death? If to you, this may increase the inheritance tax exemptions available on your death.

Details of Children (including those of any spouse/partner)

Please identify clearly children by any previous marriage or relationship.

Full Names of Children	Date of Birth	Address(es) (if different from your own)

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:

Inheritance/Trusts

Do you have any expectations of inheriting anything?

Have you inherited anything on death within the last two years? If so, there is additional scope for tax planning

Are you a beneficiary of any trusts? If so, please provide details of the trust and whether you have any powers of appointment.

Details of Assets and Liabilities

Please indicate below 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.

Assets	Your Name	Your Partner's Name	Joint Names
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	Your Name	Your Partner's Name	Joint Names
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		

Your Will Instructions

Funeral Wishes

We would normally suggest that funeral wishes be dealt with by a letter, either handed to your Executors, or placed with your Will

Please indicate here any particular wishes: Burial
 Cremation

Other directions (if any):

Executors

Your executors will be responsible for collecting in the assets of your estate, paying debts, funeral expenses and taxes and distributing the balance in accordance with your instructions. They will usually become trustees of any parts of the estate retained in trust for beneficiaries. Your executors should be people you trust and who you believe will be willing and able to accept the responsibility when the time comes.

A beneficiary may be an executor or you might choose other family members or friends. Please note that, where appropriate, the partners of Adams & Remers LLP may act as executors, either alone or jointly with other individuals. They may be named as first-choice executors or included as substitutes. For further guidance and information please ask for our note on “Choosing an Executor”.

Unless one individual will be inheriting the whole or virtually the whole of your estate, it is generally best to appoint at least two executors who can act together in the administration of your estate.

I wish the person(s) named below to act as my executor(s)

Full name of Executor(s)	Address(es)
1.	
2.	

It is prudent to appoint at least one substitute executor in case one of your first-choice executors is unable to act:

Full Name(s) and Address(es) of substitute(s):

Guardians

If you have a child or children under 18, it is important to appoint a guardian or guardians to look after them in case you and the other parent should die while they are still under age. It is sensible for both parents to make the same choice. If you are not married to the child’s other parent then different rules apply.

Guardian’s Full Names	Address	Relationship to you (if any)
1.		
2.		

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.

Beneficiary’s Full Names and address	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

Foreign Property

If you have property overseas, do you have a foreign Will? YES NO

If so, please let us have a copy of it.

Please also (if you are able) provide details of anything else that may affect its devolution on your death, e.g. manner of ownership, local matrimonial property regime etc.

Lasting Powers of Attorney Instructions

We strongly recommend that you consider signing Lasting Powers of Attorney when making Wills. For further guidance and information please ask for our information sheet. 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 Lasting 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 Lasting Powers of Attorney, they are not something that should be done without first obtaining proper legal advice.

Full names of Attorney(s)	Address(es)	Date of Birth (if known)
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.

If you are experiencing problems emailing or printing this form: Save to your desktop and then open in Adobe Reader.

PRINT FORM

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 Lasting Powers of Attorney.

Further Help & Advice

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