

OLIVER'S WILLS LTD

PRIVATE AND CONFIDENTIAL

Testamentary Instructions

CLIENT DETAILS

Client 1		Client 2	
Surname		Surname	
First Name(s)		First Name(s)	
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 client(s) got an existing Will?	No/Yes /Why change?
Do the client(s) have any children? If Yes, their ages.	No/Yes
What are the children's ages? Do any of them live at home?	
Has either client been married before?	No/Yes
Has either client 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
Does either have assets held in another name?	No/Yes
Does the client own any assets sited outside England and Wales?	No/Yes
Is either client in business	No/Yes Self Employed/Partnership/Director
If Yes, would the business continue after clients death? How?	No/Yes
Is the home in sole/ joint names or TIC? Joint/TIC/Sole	Owned/Mortgaged/Rented?
If mortgaged, is there an Endowment or other life insurance to repay debt? Is the policy assigned to the mortgage?	No/Yes No/Yes/Don't Know
If owned where are the deeds held?	
Does Clients health/travel plans/ occupation necessitate quick turnaround?	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			
2 nd 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 does the client wish 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 does the client wish 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 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	

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
- Leaving a property for someone other than as a gift
- 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.