



## WILL INSTRUCTION FORM

### YOUR PERSONAL DETAILS

Mr/Mrs/Miss/Ms/Other

Surname

Forenames

Address

Home number

Work number

Age

Occupation

Do you have a visual impairment?

Would you prefer correspondence and where possible documents to be provided in standard print, or large print?

Have you been divorced?

Have you re-married?

Please give names and ages of all children you have

Do you maintain or give financial help or have other moral obligations to anyone not to be mentioned in your will?

Are you interested in setting up a Lasting Power of Attorney? YES / NO

### YOUR PARTNER'S DETAILS

Mr/Mrs/Miss/Ms/Other

Surname

Forenames

Address

Home number

Work number

Age

Occupation

Does your partner have a visual impairment?

Would he/she prefer correspondence and where possible documents to be provided in standard or large print?

### EXECUTORS

These are the people who will carry out the wishes you express in your will. You can choose individuals (ideally at least two) and your solicitor can also do this for you.

Do you wish CM Law to appoint CM Law as Executors? YES / NO

Name of first Executor

Address

Relationship (if any)

Name of second Executor

Address

Relationship (if any)

Do you wish to appoint any back up Executors if any named above cannot/are unable to act? If so please state their details below:

Note: An executor can also be a beneficiary under your will.

### **FUNERAL WISHES**

Indicate whether you have a wish to be buried or cremated. Detailed wishes, if you have any, can be set out in a letter and kept with your will.

Matters to consider are;

- Do you wish to be buried or cremated?
- Where would you like your ashes or body to be scattered or buried?
- Do you wish to donate your body to medical science?
- Do you wish for a specific ceremony? If so please specify
- Do you wish to request that donations are made to a specific charity in place of flowers?
- Do you wish for the cost of the memorial to be deducted from the estate?

## GUARDIANS

If you have young children you should appoint one or two individuals to look after them in the event of you and your partner dying before they reach eighteen. Tell your solicitor if you have been divorced, or were not married when any of the children were born.

Name of 1<sup>st</sup> Guardian

Address

Relationship (if any)

Name of 2<sup>nd</sup> Guardian

Address

Relationship (if any)

## **ASSETS**

Please note that if your assets including your property accumulate to more than £325,000 then you could save money by inheritance tax planning in your will.

If you wish us to consider whether there is a need for estate planning and Inheritance tax advice please complete this section.

Please list all assets and their values below, including houses, bank/building society accounts and shares

**GIFTS OF YOUR POSSESSIONS  
(SPECIFIC LEGACIES)**

List any particular items you want to give to particular individuals. If this is to be a lengthy list it may be better to include it in a letter to accompany your will. If you want individuals to choose themselves what to have of your belongings state this below, with names and addresses of those concerned.

Item

Full name of recipient

Address

**CASH GIFTS  
(PECUNIARY LEGACIES)**

Give details of any gifts you want to make of set sums of money to individuals, or to any charities you want to support. If you are supporting a charity it will be helpful to take along one of its publications (or its telephone number) so your solicitor can check its correct name and address and charity registration number. Please continue on a separate piece of paper if you need to specify more details.

Amount (in words & figures)

Full name of recipient

Address

Amount (in words & figures)

Full name of recipient

Address

Amount (in words & figures)

Full name of recipient

Address

Are there any gifts you want to make where you want someone to have the benefit of something you own (such as your house) for the rest of their life, after which someone else (or a charity) is to have the item? (These are called Reversionary Legacies.)

Item

Name and address of the person to have the item for the rest of their lives:

Name and address of the person or charity to have it thereafter:

## RESIDUARY LEGACIES

What do you want to happen to everything else that you own? (This is called residue and gifts of residue are called residuary legacies). The value of whatever else you own is arrived at after your funeral costs and any expenses such as final gas bills, tax due and the costs of administering your estate have been paid, and after the gifts of money and possessions referred to above have been made. When deciding who should have what is left, think in terms of percentages, making sure that the shares you give add up to 100%. A share of residue may well be more valuable to the person you give it to than a gift of a fixed amount since it will not be eroded by inflation.

Full name Percentage share

Address

If any of the individuals named above die before you, or the named charities cease to exist, state what you want to happen to the gift they would have received:

Signed.....

Dated .....