

Will Information Form

It will help us if you complete as much as possible of this form before our meeting. There is a continuation page at the back should you not have enough room to complete any of the sections. Please do not worry if you cannot provide all the information. When we meet we will discuss your wishes in detail and advise you as necessary. The form is in two parts.

Part One - for details about your family and your wishes. Part Two - for details about your financial situation. If anything is not applicable please leave it blank.

Part One

1. Your Details

Full Name Date of Birth

Full Name Date of Birth

Address

.....

PostcodeTelephone

Email

Do either of you live abroad for all or part of the year?

.....

Are you the beneficiary of a trust? Yes No

2. Status

Single Married Widowed
 Divorced Living Together Separated
 Civil Partner

Have you been married before? Yes No

Have you previously entered into a civil partnership? Yes No

If you have ever been widowed/survived a civil partner, will you want a transferable Inheritance Tax allowance to be claimed? Yes No

Were you born outside England? Yes No

Do you have any adopted children or step-children? Yes No

Have any of your children died, and if so did they leave children? Yes No

3. Relatives

Your family situation is relevant. Please give the relationship, full name, age and address of relatives below. Please list children / step-children first, then your nearest relatives.

Relationship	Full Name	Age
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Full Address.....		
.....		

Relationship	Full Name	Age
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Full Address.....		
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Relationship	Full Name	Age
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Full Address.....		
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Relationship	Full Name	Age
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Full Address.....		
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Relationship	Full Name	Age
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Full Address.....		
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Relationship	Full Name	Age
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Full Address.....		
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4. Executors (also called Trustees)

Your executors carry out the wishes in your Will. It is essential that you choose persons who are trustworthy and have business sense. Preferably they should be younger than you. It is good to choose someone in your family. If that is not possible or your Will creates Trusts requiring a professional executor, you may wish to appoint one or more of the partners of Humphries Kirk. Spouses and civil partners generally choose each other, but you should decide who will act after you have both died. It is advisable to have a minimum of two.

If relevant, do you wish to appoint each other? Yes No

Please give the full names and addresses of up to three additional executors who may act with you or after you have died.

Name of 1st Executor

Name of 2nd Executor

.....

.....

Address

Address

.....

.....

.....

.....

Name of 3rd Executor

.....

Address

.....

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Important - Please give the **full name** of each executor and their complete address.

7. Gifts to Charities (all gifts to charities are exempt from Inheritance Tax)

Name of Charity

Address

.....

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Amount

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Name of Charity

Address

.....

.....

Amount

.....

Name of Charity

Address

.....

.....

Amount

.....

Name of Charity

Address

.....

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Amount

.....

8. Gifts of Property, Furniture, or Jewellery

Please list below or on a separate sheet details of any gift of any specific items which you wish to make.

Name of Beneficiary

Address

Description of gift

Age if under 18

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9. Residue of your Estate

This is what is left after payment of expenses, taxes and any gifts under paragraphs 6, 7 & 8.

Do you wish to pass it on to your wife/husband/civil partner? Yes No

When you have both died, do you wish the residue to be shared between your children?
Yes No

If any of your children die before you would you like their share to pass to their children (your grandchildren)?
 Yes No

At what age are your children (or your grandchildren) to inherit? 18 21 25

The age chosen may be relevant to Inheritance Tax.

If no children/grandchildren survive you, please give details of the people or charities that you would like to share the residue of your estate.

Name of Beneficiary	Address	Residuary Share (e.g. 1/2)	Age if under 18
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.....
.....

10. Other Matters

You may wish this firm to deal with your affairs when you die. This is more likely if you have been a client for some years. If you want to include a clause in your Will requesting this we can include the following:-

“I wish my Trustees to employ Humphries Kirk as their Solicitors”

Do you wish to include the above clause? Yes No

Cremation

Many people have firm views. If you have it is wise to give instructions in your Will.

Do you wish your body to be cremated? Yes No

Previous Wills

If you have made a Will before, please bring this or a copy of it with you. Please contact

us to make an appointment to discuss your Will, bringing this form with you. There is no need to worry if you have not been able to complete it all. It does help but is not essential. In any case we will wish to discuss your ideas with you in detail and any queries will then be answered.

Part Two

11. Capital Assets

What you own	Self	Spouse/ civil partner	Joint	This column is for our notes
	£	£	£	
Your house	Joint tenants/tenants in common
House contents and other valuable items
Other property / Land (eg holiday home / property bond)	Joint tenants/tenants in common
Bank / Building Society accounts
TOISAs
ISAs
National Savings
Shares & Investments
PEPs
Endowment / Life Policies
Assets abroad
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>

What you owe

House mortgage
Other liabilities

Continuation

Please give the number of the relevant section followed by the further details.