**WILL INSTRUCTIONS**

**Date of Appointment: ...........................................at ............ am/pm**

**Draft Sent: ...........................................................**

**Will Signed: ...........................................................**

**IDNENTIFICATION: ....................................................................................................................**

**Storage: AJW WILLS LTD/HOME**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PERSONAL DETAILS** | | | | |
| **NAME:** |  | | |  |
| **D.O.B.** |  | | |  |
| **ADDRESS:** |  | | |  |
| **HOME TEL:** |  | | |  |
| **MOBILE TEL:** |  | | |  |
| **EMAIL:** |  | | |  |
| **CONTACT PREFERENCE:** | **POST / EMAIL / TELEPHONE** | | | **POST / EMAIL / TELEPHONE** |
| **STATUS:**  **SINGLE / COHABITING MARRIED / SEPARATED DIVORCED / WIDOWED** |  | | |  |
| **IF COHABITING IN CONTEMPLATION OF MARRIAGE?** |  | | |  |
| **SURVIVORSHIP CLAUSE?** |  | | |  |
| **PREVIOUS WILLS:** |  | | |  |
| **FOREIGN PROPERTY/**  **FOREIGN WILLS?** |  | | |  |
| **DOMICILE:** |  | | |  |
| **ANY CONCERNS RE: CAPACITY** |  | | |  |
| **FAMILY DETAILS** | | | | |
| **MINOR CHILDREN:** |  | | |  |
| **GUARDIANS NAME AND ADDRESS:** |  | | |  |
| **ADULT CHILDREN:** |  | | |  |
| **CHILDREN OF PREVIOUS MARRIAGE:** |  | | |  |
| **ANY OTHER DEPENDANTS:** |  | | |  |
| **GUARDIANS OF MINOR CHILDREN:** |  | | |  |
| **PROPERTY DETAILS** | | | | |
| **APPROX VALUE: £** |  | | |  |
| **TENANTS IN COMMON /**  **JOINT TENANTS:** |  | | |  |
| **OUTSTANDING MORTGAGE:**  **£** |  | | |  |
| **FREE OF MORTGAGES/ENCUMBRANCES? YES/NO** |  | | |  |
| **VALUE OF ANY OTHER PROPERTIES:**  **(CHECK FOR MORTGAGES)**  **JOINT / SOLE** |  | | |  |
| **ASSETS** | | | | |
| **APPROX VALUE OF ESTATE:**  **LIST ASSETS HERE** |  | | |  |
| **VALUE OF HOME**  **JOINT / MALE / FEMALE** |  | | |  |
| **LIFE POLICIES** |  | | |  |
| **PENSIONS** |  | | |  |
| **BANK/SAVINGS**  **JOINT / SOLE** |  | | |  |
| **INVESTMENTS**  **JOINT / SOLE** |  | | |  |
| **DEBTS:** |  | | |  |
| **VALUE OF PERSONAL CHATTELS?** |  | | |  |
| **BENEFICIARY UNDER A TRUST?** |  | | |  |
| **BUSINESS ASSETS?** |  | | |  |
| **PETS made in lifetime?**  **Has the Testator/Testatrix benefited any child or anyone else in the past in any way, e.g. paying off debts, deposit for a house etc?? Should this be brought into account (Hotchpot clause??)** |  | | |  |
| **Is IHT an issue?** |  | | |  |
| **ACCOUNTANT?** |  | | |  |
| **FINANCIAL ADVISOR?** |  | | |  |
| **WILL INSTRUCTIONS** | | | | |
| **FUNERAL WISHES:** |  | | |  |
| **LETTER OF WISHES:**  **(NOT BINDING)** |  | | |  |
| **REFER TO STEP LIST OF ASSETS IF REQUIRED** |  | | |  |
| **EXECUTORS:**  **NAMES AND ADDRESSES**  **BUSINESS EXECUTORS??** | **EXECUTOR 1** | | | **EXECUTOR 2** |
| **REPLACEMENT EXECUTORS:**  **NAMES AND ADDRESSES** |  | | |  |
| **BUSINESS EXECUTORS:**  **NAME AND ADDRESS:** |  | | |  |
| **URGENCY OF WILL PREPARATION:** |  | | |  |
| **BENEFICIARY UNDER A TRUST?** |  | | |  |
| **EXCLUSIONS?**  **If any prepare a letter to be placed with will as to reasons – Are they financially dependent by t; is this continuing/do they have means of supporting themselves?/if a former spouse, the letter must state that the financial order was made in full and final settlement** |  | | |  |
| **POSSIBLE CLAIMANT:**  **If there are any persons who could have a possible claim on your estate who you have purposely omitted; i.e. ex spouse; children from previous marriage, anyone else who is financially dependent on you etc. If so please state who and give your reasons.** |  | | |  |
| **POTENTIALLY EXEMPT TRANSFERS:**  **Consider those in receipt of gifts of money and any claim which may arise under the 1975 Act** |  | | |  |
| **LEGACIES:**  **(On which death are they to take effect? N.B. 1st or 2nd death)**  **(consider age contingencies and intermediate income)**  **FREE OF IHT?**  **CHARITABLE GIFTS:** |  | | |  |
| **GIFTS OF PERSONALTY:**  **(On which death are they to take effect?)**  **IS A LIST REQUIRED (by way of incorporation in the will. N.B. any amendment by codicil becomes a public document)** | |  |  | |
| **DEVISE?**  **TO PASS SUBJECT TO MORTGAGE OR MORTGATE TO BE REPAID FIRST?**  ***N.B. consider a survivorship clause where different remaindermen and for* *unmarried couples*** | |  |  | |
| **RESIDUE:**  **Consider age contingencies for children**  ***Consider a survivorship clause where different residuary beneficiaries and for unmarried couples*** | |  |  | |
| **SUBSTITUTIONAL RESIDUE GIFT:**  **Consider age contingencies for children** | |  |  | |
| **ANY ADVICE FOR PLANNING FOR CARE FEES APPROPRIATE?**  **IS SEVERANCE OF THE HOME REQUIRED?** | |  |  | |
| **CONSIDER MAINTENANCE OF MATRIMONIAL HOME; PROVISION TO BUY ANOTHER HOUSE; INSURANCE OF THE HOME ETC; ANY OTHER REASONS WHY A LIFE INTEREST IN HALF OR WHOLE OF HOME SHOULD BE RESRICTED E.G. ON REMARRIAGE OR NEW PARTNER (ENSURE RESIDUARY BENEFICIARIES ARE DIFFERENT TO THE LIFE INTEREST)** | |  |  | |
| **IF SEVERANCE REQUIRED:**  **TITLE NUMBER OF PROPERTY:** | |  |  | |
| **ADDRESS:** | |  |  | |
| **MORTGAGE PROVIDER** | |  |  | |
| **WHERE ARE DEEDS?** | |  |  | |
| **POSSIBLE CLAIMANT:**  **If there are any persons who could have a possible claim on your estate who you have purposely omitted; i.e. ex spouse; children from previous marriage, anyone else who is financially dependent on you etc. If so please state who and give your reasons.** | |  |  | |
| **LASTING POWER OF ATTORNEY(BOTH PROPERTY & FINANCES AND HEALTH AND WELFARE)/EPA**  **YES/NO**  **DATE:** | |  |  | |

**OTHER INFORMATION/INSTRUCTIONS:-**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**.........................................................................................................................................................**

**N.B.**

**If either person has been married before is maintenance paid to ex wife and children?**

**If yes, how much maintenance and for how long is this to be paid?**

**Record details of any confusion, loss of memory exhibited by the clients**

**Record any comments made by clients during the meetings about the background of their instructions**

**Record advice or guidance given to the clients but not taken by them and the reasons why such advice has not been taken.**

**Record details of anyone else present at either instruction or attestation meetings;**

**BRIEF SUMMARY OF CLEINTS OVERALL WISHES AND OBJECTIVES:**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**……………………………………………………………………………………………………………………………………………………….**

**Third Parties Present at Will Instruction Meetings**

Record the following:-

1. Why they were there;
2. During which parts of the interview they were present;
3. What contribution they made to the meeting; and
4. Observational notes on the attitudes displayed between the testator and the third party.

**Family Tree**

**I**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I I I**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I I I**

**N.B. younger couples – parents separated??**

**Ask if any children have any significant needs, if adults, do they work etc?**