**WILL INSTRUCTIONS**

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

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

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

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

**Storage: AJW WILLS LTD/HOME**

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| **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:-**

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**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:**

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**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**

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

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