

INSTRUCTION SHEET FOR THE PREPARATION OF YOUR WILL

Please complete and return this form as soon as possible. If needed, we will prepare a draft Will for your consideration before preparing an engrossed original for you to sign.

1		About You & Your Family	
1.1	Have you previously made a Will?	yes <input type="checkbox"/> no <input type="checkbox"/>	
1.2	Please provide the following details about yourself		
First Names		Surname or Family Name	
Address		Post Code	
Telephone Number		Date of Birth	
Occupation		Email	
1.3	Are you, or any of your family, known by any other names?	yes <input type="checkbox"/> no <input type="checkbox"/>	
	If so, by what?		
1.4	Are you married/entered into a Civil Partnership?	yes <input type="checkbox"/> no <input type="checkbox"/>	
1.5	Are you planning to get married/enter into a Civil Partnership in the near future?	yes <input type="checkbox"/> no <input type="checkbox"/>	
1.6	Have you been married/entered into a Civil Partnership before?	yes <input type="checkbox"/> no <input type="checkbox"/>	
1.7	Please give the names of all of your children (if any) and dates of birth	Name	D.O.B.
		Name	D.O.B.
		Name	D.O.B.
		Name	D.O.B.
1.8	If any children are from a former partner, please specify		

2		Your Assets	
2.1	Do you own your own home?	yes <input type="checkbox"/> no <input type="checkbox"/>	
2.2	Is it in your sole name?	yes <input type="checkbox"/> no <input type="checkbox"/>	
	If not, please state the names of the co-owners		
	Name		
	Name		
2.3	Do you have a business?	yes <input type="checkbox"/> no <input type="checkbox"/>	
	If so, please state whether it is a limited company, partnership or you trade in you own name.		

2.4	Please list your main assets and approximate values. And if property, the amount of any mortgage(s)	
		£
		£
		£
		£
		£

2.5	Do you have any jointly-owned assets? If so, please give a general description and approximate values	yes <input type="checkbox"/> no <input type="checkbox"/>
		£
		£
		£
		£

2.6	Do you own any foreign property? If so, please give a general description, location and approximate values	yes <input type="checkbox"/> no <input type="checkbox"/>
		£
		£

3	Will Executor
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3.1	Whom do you wish to appoint as Executor? This is the person or persons who will be in charge of winding up your affairs (otherwise your nearest relative will be given the task). The executor can be a beneficiary or anyone else that you trust. It might be a relative or friend, legal firm or bank. If your estate involves land or you wish to set up a trust for some or all of your beneficiaries, you should appoint two Executors. Cavendish Legal Group will be pleased to act as Executor either solely or jointly with another Executor. (You should seek the permission of the person or persons you appoint.)	
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Name	Address	Postcode
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Name	Address	Postcode
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4	Bequests
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4.1	Do you wish to specify to whom a particular item will be given e.g. 'My antique picture to ...' Please bear in mind that only items you intend to keep indefinitely should be mentioned.	
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4.2	Do you wish to make any cash gifts? If so, please specify the amount and the full name of the beneficiary and age (if under 16), or charitable institution.
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Name	Address
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Name	Address	Postcode
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Name	Address	Postcode
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5	Remaining Estate
5.1	After payments of debts and funeral expenses and any specific gifts, you need to specify how the remainder of your estate will be dealt with e.g. 'The remainder of my estate to my wife...' or 'The remainder of my estate to my children in equal shares...'. Please give full names and addresses.

Name	Address
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Name	Address	Postcode
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Name	Address
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Name	Address	Postcode
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5.2	If the person named in 5.1 above dies before you, to whom do you wish to benefit in their place e.g. 'If my wife dies before me then everything to my children in equal shares...'. Please give full names and addresses.
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Name	Address
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Name	Address	Postcode
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6	Leaving Bequests to Minors
6.1	If you have children that are minors and would like to name a person to be guardian until the children reach 18 (assuming your wife or partner has failed to survive you) please name the guardian here. Doing this means someone is legally responsible for your children and avoids uncertainty or family disagreement.

Name	Address	Postcode
Name	Address	Postcode

7	Children to benefit at what age?
7.1	If children will benefit under your Will, it could take years before they receive any money left to them because of their age. At what age do you wish the child or children to benefit? 18, 21, 25 or other? Please specify. Unless you state otherwise, we will include in the provisions of the Will powers for the Executors (additional to the limited powers given to the next of kin by Parliament). These powers will enable the Executors to deal with the estate as economically and efficiently as possible ensuring that as much of your estate as possible goes to your family when they need it.
	I want my child or children to benefit at the age of _____ Years of age

8	Additional Provisions
8.1	Do you have any other provisions you would like to include in this Will?

9	Special Requests
9.1	Do you have any special burial requests e.g. 'I wish my body to be cremated...'. Please specify.