



Your Will Writing Instruction Form

Will Writing Service at Thackray Williams

Why should you write a Will?

Making a Will ensures that your property, savings and possessions will go to the people and causes you care about and can minimise the risks of any disputes arising between those close to you. It may also help to reduce the amount of Inheritance Tax that has to be paid on your Estate and protect assets you wish to leave for your children.

If you die without leaving a valid Will, then the “Intestacy Rules” will apply. These Rules determine who will get the assets in your Estate. They do not always produce a ‘fair’ result or have the effect that people imagine. For example, the Rules give nothing at all to unmarried partners and only guarantee to leave the entire Estate to a surviving spouse or civil partner if there are no children.

If the Rules apply, it may mean that there is an increased chance of a family dispute and/or a greater likelihood of an Inheritance Tax liability on your Estate. Both these risks may be avoided by preparing a Will.

Why use a Solicitor?

Although it is possible to write a Will without the help of a solicitor, the Law Society advises against it. Without the help of an expert, there is a real risk that a home-made Will might contain a mistake or be invalid, which could cause significant problems for your family and friends after your death.

What kind of Will do I need?

No two Wills are ever the same: they are bespoke documents tailored to your own personal and financial circumstances. Your Will might well be very straightforward, but the eventual format will depend on your circumstances and wishes. A Will can be useful for the following reasons:

- to pass assets in a tax-efficient manner
- to protect your assets from potential long-term care costs
- to preserve assets for your children if you are in a second marriage or relationship
- establish a trust for a minor, disabled or vulnerable beneficiary
- to benefit charitable organisations that are important to you.

Marriages and civil partnerships: For the sake of brevity, references in this document to ‘spouses’ and ‘marriages’ include civil partners and civil partnerships respectively. References to ‘divorce’ and ‘widows’ or ‘widowers’ should be interpreted accordingly.

Let's begin...



About You

Please enter the following details about yourself and your partner (if applicable).

	You		Your Partner	
Title:				
Full Name: (inc. middle names)				
Address:				
Home Telephone Number:				
Work Telephone Number:				
Mobile Telephone Number:				
Email Address:				
Date of Birth:				
Place of Birth:				
Current (and any former) nationality/citizenship:				
	Mother		Father	
Nationality/citizenship of each parent at your birth:				
How long have you lived in England & Wales?				

Are the two of you currently:	married to one another : <input type="checkbox"/> civil partners together : <input type="checkbox"/> neither <input type="checkbox"/>
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	You		Your Partner	
Have you been married before?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
Please list any other names in which your assets are held:				

	You		Your Partner	
Do you have an existing Will?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
If yes, where is it held?				

How did you come to choose Thackray Williams?	
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Deceased & Former Spouses

Please list any former spouses or civil partners, either living or deceased, for either you or your current partner.

If the marriage ended by divorce, please advise, in the area below, if the divorce was granted either before 1975 or outside England and Wales.

	You	Your Partner
Do you have a former partner who is still alive?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
If yes, is he/she still financially dependent on you?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
If no, did he/she die during the marriage/civil partnership?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
If the marriage ended in divorce, please advise if the divorce was granted:	before 1975: <input type="checkbox"/> outside England & Wales: <input type="checkbox"/>	before 1975: <input type="checkbox"/> outside England & Wales: <input type="checkbox"/>

Children or Grandchildren

If you have children and/or grandchildren from your **previous marriage/relationship**, please complete the next section.

Name	Age	Child or Grandchild	Of you or your partner?	Financially dependent?

If you have children and/or grandchildren from your **present marriage/relationship**, please complete the next section.

Name	Age	Child or Grandchild?	Of you or your partner?	Financially dependent?

Please give full names and addresses of any persons who are financially dependent on you or your spouse/partner or whom either of you help to maintain. *This may include former spouses, elderly relatives or adult children. Such persons may have a claim against your Estate and therefore we need to look at the circumstances in order to properly advise you about the terms of your Will.*

	You	Your Partner
Name:		
Relationship:		

Your Executors

These are the people who will carry out the wishes you express in your Will. You can choose individuals, or professional executors such as a solicitor, accountant or your bank. We recommend having at least two, but not more than four, executors. A beneficiary can be an executor - spouses often appoint each other (plus another/others).

	You	Your Partner
First executor full name:		
Address:		
Second executor full name:		
Address:		
Substitute executor full name:		
Address:		
Second substitute executor full name:		
Address:		

Sometimes it can be helpful to appoint a professional executor, especially if there are complex or difficult circumstances or if you have no suitable candidates among your family and friends. Thackray Williams partners often accept appointments to act as executors on their own or with family members/friends. If this might be helpful to you, add 'Thackray Williams' to the relevant boxes above.



Guardians

These are the people who will care for any minor children in the event of your death. *This is only relevant if you have children under the age of 18 when you die.*

Try to appoint one person or a couple. Choosing two people who live apart is not a good idea.

If your first choice of guardian(s) cannot take up the appointment, you can nominate a substitute (or substitutes).

Your First Choice Guardian(s)	
First guardian name or names:	
Address:	
Telephone number:	
Substitute Guardian(s)	
Substitute guardian name or names:	
Address:	
Telephone number:	

Funeral Directions

We can include details of your funeral wishes in your Will, although these are not legally binding. *We nevertheless recommend that you tell your family about your wishes so that they can make appropriate arrangements when you die.*

	You	Your Partner
Funeral Directions:	Cremation: <input type="checkbox"/> Burial: <input type="checkbox"/> Other: <input type="checkbox"/>	Cremation: <input type="checkbox"/> Burial: <input type="checkbox"/> Other: <input type="checkbox"/>
If other, please provide details:		
Do you have a funeral plan?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
If yes, please provide details:		
Are you considering organ donation or leaving your body to medical science?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>

Money Gifts

Please give details of any gifts you want to make of sums of money.
You may wish to make gifts to your executors/guardians if they won't otherwise receive anything under your Will.

	You	Your Partner
Name of recipient 1: <i>(Individual/charity)</i>		
Address:		
When payable? <i>(when you die/on first death/ on second death/on each death)</i>		
Name of recipient 2: <i>(Individual/charity)</i>		
Address:		
When payable? <i>(when you die/ on first death/ on second death/on each death)</i>		
Name of recipient 3: <i>(Individual/charity)</i>		
Address:		
When payable? <i>(when you die/on first death/ on second death/on each death)</i>		
Name of recipient 4: <i>(Individual/charity)</i>		
Address:		
When payable? <i>(when you die/on first death/ on second death/ on each death)</i>		
Name of recipient 5 <i>(Individual/charity)</i>		
Address:		
When payable? <i>(when you die/on first death/ on second death/ on each death)</i>		

If necessary, continue on a separate sheet.

Gifts of Interest in Property

Do you want to make an outright gift of a particular property to someone, or alternatively permit them to live in it for life/while they need it, so that ultimately it will pass to someone else? *Do not complete this section if you intend to leave the property to your beneficiaries along with the rest of your estate (see below).*

	You	Your Partner
Property Address:		
Recipient name(s):		
Ultimate beneficiary name(s):		
Nature of gift:	outright: <input type="checkbox"/> for life: <input type="checkbox"/> limited period: <input type="checkbox"/>	outright: <input type="checkbox"/> for life: <input type="checkbox"/> limited period: <input type="checkbox"/>

Gifts of Specific Items

You may wish to make outright gifts of your house contents and personal effects, or alternatively give them to a specific person or to your executors to distribute in accordance with a memorandum of wishes. *A memorandum of wishes is a letter to that individual or your executors saying how you would wish them to divide your effects. This is a flexible arrangement and can be changed without making a new Will.*

	You		Your Partner	
I would like my house contents/ personal effects to be included: in a Memorandum of Wishes:	Yes: <input type="checkbox"/> No: <input type="checkbox"/>		Yes: <input type="checkbox"/> No: <input type="checkbox"/>	
as outright gifts in my Will to the following persons:	Person	Item(s)	Person	Item(s)

Gifts of Business Assets

Do you own a business or a share in a business? Yes: No:

Important note: *If you have answered 'yes' to the above question, you will need to complete Appendix 1 to this form.*

The Rest of Your Estate

What do you want to happen to everything else that you own (known as the 'residue')? *The value of whatever else you own is arrived at after your funeral costs, Inheritance Tax and any other expenses (such as unpaid tax, debts or utility bills) have been paid, and after any gifts of money and possessions have been made.*

Do you want everything to pass to your spouse/partner? Yes: No:

If your spouse/partner has died, or you have answered 'no' to the above, then who do you want to receive your estate? *Think about it in terms of percentages, making sure that the shares that you give add up to 100%.*

You may wish your children or grandchildren (if any) to inherit. If they are minors, you may wish to delay the distribution of capital to them until they are older. We can advise further.

	You	Your Partner
Recipient name in full:		
Percentage %		
Recipient name in full:		
Percentage %		
Recipient name in full:		
Percentage %		
Recipient name in full:		
Percentage %		
Recipient name in full:		
Percentage %		

If any of the beneficiaries named above does not survive you, do you want their share of the estate to pass to their own children?

You	Your Partner
Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>

If yes, at what age should they receive their inheritance?

You	Your Partner
18: <input type="checkbox"/> 21: <input type="checkbox"/> 25: <input type="checkbox"/> Other: <input type="checkbox"/>	18: <input type="checkbox"/> 21: <input type="checkbox"/> 25: <input type="checkbox"/> Other: <input type="checkbox"/>

Substitute Beneficiaries

To cover a situation in which none of the beneficiaries in the previous table survive you, we suggest you consider appointing substitute beneficiaries to prevent your estate being distributed in accordance with the Intestacy Rules. We often recommend that you and your partner (if any) have identical substitute beneficiaries. This eases the administration and ensures fairness between the two family groups.

Recipient name:	Percentage: %

Other Concerns

Do any of your beneficiaries have any form of disability? Yes: No:

If yes, please give brief details:

Are you concerned about the wisdom of leaving money or assets outright to any beneficiaries who are vulnerable or in difficult circumstances? Yes: No:

Your Assets

Please complete the following schedules to help your legal advisor assess the Inheritance Tax position of your estate.

Assets	You	Your Partner
Your main home: Overall Value: £	Value (You):	Value (Your Partner):
Do you have a mortgage on the property?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
If yes, how much is outstanding?	Amount:	
Do you have a life insurance policy to cover the mortgage?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
Is the property:	Freehold: <input type="checkbox"/>	Leasehold <input type="checkbox"/>
		Sole name <input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenants in Common <input type="checkbox"/> Don't know <input type="checkbox"/>
Other UK Property Address:	Value (You):	Value (Your Partner):
Do you have a mortgage on the property?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
If yes, how much is outstanding?	Amount:	
Do you have a life insurance policy to cover the mortgage?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
Is the property:	Freehold: <input type="checkbox"/>	Leasehold: <input type="checkbox"/>
		Sole name <input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenants in Common <input type="checkbox"/> Don't know <input type="checkbox"/>
Is the property rented out?	Yes: <input type="checkbox"/>	No: <input type="checkbox"/>
	Value (You):	Value (Your Partner):
		Jointly Owned (Total Value):
Personal possessions of significant value: (Furniture, paintings and other artwork, cars, boats and jewellery)		
Cash: (Bank and/or building society accounts, cash ISAs)		
Investments: (Shareholdings, bonds, gilts, unit trusts, NS&I products)		
Business Interests: (Inc value but please complete Appendix 1 at the back of the form)		
Any indebtedness?: (Other than mortgages on properties listed above)		

Foreign Assets

Do you or your spouse/partner have any assets held outside the UK? Yes: No:

Important Note: *If you have answered 'yes' to the above question, you will need to complete Appendix 2 to this form*

Digital Assets

You may have assets of either financial or sentimental value which are held digitally, such as bank accounts, gambling or bingo accounts, share trading accounts, copyright works, photographs, videos, music etc. There may not be any paper records of these accounts and so your executors may not be aware of them. Consequently they may be lost when you die unless you record their existence and make the information available to your executors.

	You	Your Partner
Do you access any accounts solely by digital means?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Do you store anything of sentimental value on your computer or on-line?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Do you own any domain names (website names)?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Do you store any creative works on any computer eg music, videos, photographs, novels, poetry etc?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>
Do you hold any accounts that may have cash balances eg eBay, PayPal, bingo, gambling, share trading etc?	Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Yes: <input type="checkbox"/> No: <input type="checkbox"/>



Life Insurance Policies

Do you or your spouse/partner have any life insurance policies? *Please note the details below.*

Whose life is insured?	Who is entitled to the proceeds?	Name of Insurance Company	Sum assured	Expiry date	Is it in Trust? Yes/No

Pensions

Do you or your spouse/partner have any pension savings? *Please note the details below.*

Name of pension holder	Scheme / Policy	Amount of death benefit	Is death benefit in Trust? Yes/No	Widow's / Dependants Pension	Who are your nominated beneficiaries?

Death in Service Benefit

Do you or your spouse/partner have any death in service benefits? *Please note the details below.*

Whose benefit is this?	Employer	Nomination form completed?	Who are your nominated beneficiaries?
		Yes: <input type="checkbox"/> No: <input type="checkbox"/>	
		Yes: <input type="checkbox"/> No: <input type="checkbox"/>	

Gifts

Have you or your spouse/partner made any significant gifts of money or other assets in the last 7 years?

	You	Your Partner
Recipient name:		
Details and Date of gift:		
Recipient name:		
Details and Date of gift:		
Recipient name:		
Details and Date of gift:		

Appendix 1: Business Assets

You need only complete this section if you answered 'yes' to having business assets. This applies to all business assets owned by you and/or your partner:

Name of Business:	
Address:	Postcode:
Nature of Business:	
Does the business trade? Yes: <input type="checkbox"/> No: <input type="checkbox"/>	Does it hold investment assets? Yes: <input type="checkbox"/> No: <input type="checkbox"/>
How is your business organised? Company <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Trader <input type="checkbox"/>	
How much of the business is owned by you or your spouse/partner?	
	You: %
	Your spouse: %

Appendix 2: Assets Situated Outside the UK

You need only complete this section if you answered 'yes' to having foreign assets. This applies to all assets held overseas by you and/or your partner.

Land and buildings	You	Your Partner
In which country/state are they situated?		
Please give a brief description:		
Please name any other co-owners:		
Approximate value of your share:		
If buildings, do you own the contents?		

Cash/Investments	You	Your Partner
In which country/state are they held?		
Please give a brief description:		
Approximate value of your share:		

In some countries, the law requires certain assets (or a share of them) to be passed on to particular family members

Anything else?

Is there any other information that you think is relevant?

Details:

Your Signature

I understand that Thackray Williams LLP's advice will be given on the basis of the information disclosed in this document, and I agree to notify them of any significant changes before I sign my Will.

Signature:

Signature:

Date:

Date:

If you return this form by email, you may sign a hard copy at the later meeting.

What do you do now?

Once you are happy that the form is as complete as possible and the information contained within it is correct, please send your form back to your legal advisor at the appropriate office:

Thackray Williams LLP
Kings House,
32-40 Widmore Road
Bromley
Kent, BR1 1RY

Thackray Williams LLP
225-235 High Street
Beckenham
Kent, BR3 1BN

Thackray Williams LLP
73 Station Road
West Wickham
Kent, BR4 0QG

or email info@thackraywilliams.com or your individual legal advisor.

Complementary services

Storing Your Will

If your Will is lost or destroyed, or if your Executors don't know where to find it, your final wishes may never be carried out. You need to decide how to look after your Will, make the required arrangements and then let your Executors know where it is stored. You should ensure your Will is kept in a safe, fire-proof place. We offer a secure, free Will storage service, but there are other options: the Probate Registry, your bank or other commercial storage providers. These will all charge a fee. You can also store your Will in your own home (if you have appropriate facilities).

If you would like to store your Will with Thackray Williams, please speak to your legal advisor about our free service.

Other services

We offer a number of complementary services that you may want to consider at the same time as writing your Will. We also have close relationships with independent financial and accounting advisors to assist you in other matters that may arise during the process of Will writing.

If you would like to speak to somebody about any of the following issues, please tick the appropriate box(es).

- Lasting Power of Attorney - Business or Personal
- Declaration of Trust
- Inheritance Tax Planning
- Pensions Advice
- Asset Protection
- Income Security
- Ongoing Care needs

Feedback

We value any feedback on your dealings with us. You may be contacted by our marketing department for your views on our service during or after the Will-making process.

Offices in -

Bromley

Kings House
32-40 Widmore Road
Bromley, BR1 1RY
Telephone 020 8290 0440

Beckenham

225-235 High Street
Beckenham, BR3 1BN
Telephone 020 8663 0503

West Wickham

73 Station Road,
West Wickham, BR4 0QG
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