

# DRAFT

## HUSBAND or PARTNER (NAME IN FULL)

.....  
Home Number                      Work Number                      Mobile Number  
.....

## WIFE or PARTNER (NAME IN FULL)

.....  
Home Number                      Work Number                      Mobile Number  
.....

## ADDRESS IN FULL

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

## PROPERTY DETAILS

Is Property Mortgaged ? YES / NO      If YES please supply these details –

Name of Lender .....

Lenders Address  
.....  
.....

Mortgage Roll Number .....

## EXECUTORS

Executors are the people who “execute” or complete your Will i.e. completing the Probate forms and carrying out your instructions. Executors may also be Trustees involved in long-term management of assets i.e. looking after money set aside for young children. These should be people you trust, relatives or friends and they can also be beneficiaries.

### FOR HUSBAND / PARTNER:

Will your WIFE / PARTNER be the only Executor YES / NO ? If NO please give details overleaf of the other people who you wish to have as your Executors.

### FOR WIFE / PARTNER:

Will your HUSBAND / PARTNER be the only Executor YES / NO ? If NO please give details overleaf of the other people who you wish to have as your Executors.

## CLIENT INSTRUCTIONS

**DRAFT**

EXECUTOR NUMBER ONE TO HUSBAND or PARTNER (NAME IN FULL)

.....

Relationship to HUSBAND or PARTNER  
(Brother, Friend etc) .....

ADDRESS

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

EXECUTOR NUMBER TWO TO HUSBAND or PARTNER (NAME IN FULL)

.....

Relationship to HUSBAND or PARTNER  
(Brother, Friend etc) .....

ADDRESS

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

EXECUTOR NUMBER ONE TO WIFE or PARTNER (NAME IN FULL)

.....

Relationship to WIFE or PARTNER  
(Sister, Friend etc) .....

ADDRESS

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

**DRAFT**

EXECUTOR NUMBER TWO TO WIFE or PARTNER (NAME IN FULL)

.....

Relationship to WIFE or PARTNER  
(Sister, Friend etc) .....

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

**GUARDIANS**

If you have children under the age 18 you must by law appoint Guardians in your Will. You should always appoint people who will be both physically and financially able to look after young children

GUARDIAN NUMBER ONE IF WIFE or PARTNER PREDECEASES (NAME IN FULL)

.....

Relationship to HUSBAND or PARTNER .....

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

GUARDIAN NUMBER TWO IF WIFE or PARTNER PREDECEASES (NAME IN FULL)

.....

Relationship to HUSBAND or PARTNER .....

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

**DRAFT**

GUARDIAN NUMBER ONE IF HUSBAND or PARTNER PREDECEASES (NAME IN FULL)

.....

Relationship to WIFE or PARTNER

.....

ADDRESS

House Number  
Or Name

.....

Street

.....

Town

.....

County

.....

Postcode

.....

GUARDIAN NUMBER TWO IF HUSBAND or PARTNER PREDECEASES (NAME IN FULL)

.....

Relationship to WIFE or PARTNER

.....

ADDRESS

House Number  
Or Name

.....

Street

.....

Town

.....

County

.....

Postcode

.....

**GIFTS & LEGACIES (These are nearly always put into a Letter of Wishes)**

**GIFTS OF SPECIFIC ITEMS**

These are the specific named items that you want to go to your beneficiary. It is important to clearly identify the item as much as possible. For example, it is not a good idea to just state "My gold watch" if you have several gold watches; you should state "My 1980 gold Rolex watch".

**GIFTS OF CASH**

Like the specific legacies above it is important to clearly identify the monetary amounts, accounts, stocks or shares. These gifts are usually paid free of any tax. you should also state whether any monetary amount is to be index-linked i.e. the value of £100 in 10 years time will be considerably less than its value today if it is not linked to the inflation rate.

**GIFTS OF SPECIFIC ITEMS FROM HUSBAND / PARTNER**

WHAT

.....

TO

.....

WHAT

.....

TO

.....

**DRAFT**

GIFTS OF SPECIFIC ITEMS FROM WIFE / PARTNER

WHAT .....

TO .....

WHAT .....

TO .....

CASH GIFTS FROM HUSBAND / PARTNER

AMOUNT .....

TO .....

AMOUNT .....

TO .....

CASH GIFTS FROM WIFE / PARTNER

AMOUNT .....

TO .....

AMOUNT .....

TO .....

**DISTRIBUTION OF RESIDUARY ESTATE**

**Estate to go to Spouse / Partner Yes / No**

**Then to children Yes / No – SEE NAMED BENEFICIARIES BELOW**

CHILD ONE .....

ADDRESS

House Number  
Or Name .....

Street .....

Town .....

County .....

Postcode .....

**DRAFT**

CHILD TWO .....

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

CHILD THREE .....

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

**NAMED BENEFICIARIES**

BENEFICIARY ONE .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

BENEFICIARY TWO .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County ..... Postcode .....

**DRAFT**

BENEFICIARY THREE .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County .....      Postcode .....

BENEFICIARY FOUR .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County .....      Postcode .....

**RESERVE BENEFICIARIES (Should all others predecease you)**

BENEFICIARY ONE .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County .....      Postcode .....

BENEFICIARY TWO .....

EQUAL SHARE YES / NO      If NO give percentage      %

**ADDRESS**

House Number  
Or Name .....

Street .....

Town .....

County .....      Postcode .....

**D R A F T**  
**EXCLUSIONS**

Do you wish to exclude anyone from your Will ?

**HUSBAND / PARTNER to exclude :**

<b>Name</b>	
<b>Relationship</b>	

**WIFE / PARTNER to exclude:**

<b>Name</b>	
<b>Relationship</b>	

**FUNERAL DIRECTIONS**

**HUSBAND / PARTNER**

**WIFE / PARTNER**

<b>Do you wish to be :</b>	<b>Do you wish to be :</b>																
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><b>Buried</b></td> <td style="width: 20%;">Yes</td> </tr> <tr> <td></td> <td>No</td> </tr> <tr> <td><b>Cremated</b></td> <td>Yes</td> </tr> <tr> <td></td> <td>No</td> </tr> </table>	<b>Buried</b>	Yes		No	<b>Cremated</b>	Yes		No	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;"><b>Buried</b></td> <td style="width: 20%;">Yes</td> </tr> <tr> <td></td> <td>No</td> </tr> <tr> <td><b>Cremated</b></td> <td>Yes</td> </tr> <tr> <td></td> <td>No</td> </tr> </table>	<b>Buried</b>	Yes		No	<b>Cremated</b>	Yes		No
<b>Buried</b>	Yes																
	No																
<b>Cremated</b>	Yes																
	No																
<b>Buried</b>	Yes																
	No																
<b>Cremated</b>	Yes																
	No																

<b>Where:</b>	<b>Where:</b>
<b>If cremated please give details of disposal of ashes</b>	<b>If cremated please give details of disposal of ashes</b>

**Declaration for Last Will and Testament by Testator(s)**

I/We confirm that I/We am/are over the age of 18 years and am/are of sound mind. The information given on the form is complete and correct and is to be used as the basis for preparing my/our Last Will and Testament. In addition to appointments, legacies and distribution of residue I/we agree to my/our Executors and Trustees having normal powers to aid the administration of my/our Estate(s). I/we know of no other Trusts or constraints that would prevent my/our Estate(s) being distributed as I/we have requested.

Signed : ..... Signed : .....

Date: .....