

# WILL INSTRUCTIONS

Note: these Will instructions are for a basic Will made in England or Wales using the English Legal system. It does not have any trust provisions, nor does it allow for tax planning.

For estates over £325,000, please contact us on **0844 412 5857** to discuss your needs.

Please specify whether this is a:-

- Single Will
- Mirror Wills for a married couple/civil partnership
- Mirror Wills for a co-habiting couple

*References to civil partnerships in these instructions apply to registered civil partnerships*

## PERSONAL DETAILS

<b>Title: Mr/Mrs/Ms/Other Title</b> <input type="text"/>
<b>Surname:</b> <input type="text"/>
<b>Full Forenames:</b> <input type="text"/>
<input type="text"/>

<b>Full Postal Address:</b> <input type="text"/>
<b>Mobile Tel No:</b> <input type="text"/>
<b>Home Tel No:</b> <input type="text"/>
<b>Daytime Tel No:</b> <input type="text"/>

## SPOUSE/PARTNER'S DETAILS

<b>Title: Mr/Mrs/Ms/Other Title</b> <input type="text"/>
<b>Surname:</b> <input type="text"/>
<b>Full Forenames:</b> <input type="text"/>
<input type="text"/>

<b>Full Postal Address(if different from above):</b> <input type="text"/>
<b>Mobile Tel No:</b> <input type="text"/>
<b>Home Tel No:</b> <input type="text"/>
<b>Daytime Tel No:</b> <input type="text"/>

## EXECUTORS

An Executor is the person or persons you appoint in your Will to wind up and distribute your estate. It makes sense to choose someone who is younger than you (although over 18 years of age) and in good health. Normally there are one or two Executors, but you can appoint up to four. As part of our Will offer, The Partners of Conveyancing Expert Limited will be listed as the first executor under your Will.

Please indicate who you wish to appoint as Executors.

Conveyancing  
Expert Sole

Conveyancing Expert  
Jointly with spouse/civil  
partner/partner

Your spouse/civil  
partner/partner or if they are  
unable to act, Conveyancing  
Expert

Others  
(please indicate below)

### Details of Executor(s)

<b>Full Name of First Executor:</b> <input style="width: 95%; height: 20px;" type="text"/>	<b>Full Postal Address:</b> <input style="width: 95%; height: 60px;" type="text"/>
<b>Daytime Tel No:</b> <input style="width: 95%; height: 20px;" type="text"/>	
<b>Full Name of Second Executor:</b> <input style="width: 95%; height: 20px;" type="text"/>	<b>Full Postal Address:</b> <input style="width: 95%; height: 60px;" type="text"/>
<b>Daytime Tel No:</b> <input style="width: 95%; height: 20px;" type="text"/>	

## YOUR PERSONAL CIRCUMSTANCES

(A) If you are considering marriage or entering into a Registered Civil Partnership please complete this section		(B) Please complete this section if relevant.					
Please give the full name of your future spouse/civil partner/partner <input style="width: 95%; height: 25px;" type="text"/>		Are you: Divorced?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
If you are unmarried, do you intend to marry or enter into a registered civil partnership in the near future?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Intending to be divorced or intending to dissolve the civil partnership in the near future?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
If you do intend to marry or enter into a registered civil partnership in the near future, is the Will to be effective only after the marriage/civil partnership takes place?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Separated, legally or otherwise from your husband/wife/civil partner, or are you intending to become separated in the near future?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
If the Will is to take effect prior to and continue to be effective after the marriage/civil partnership, must the marriage/civil partnership occur within a particular time?	<table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%;">Yes <input type="checkbox"/></td> <td style="text-align: center; width: 50%;">No <input type="checkbox"/></td> </tr> </table>	Yes <input type="checkbox"/>	No <input type="checkbox"/>				
Yes <input type="checkbox"/>	No <input type="checkbox"/>						
If 'Yes' by what date?	<input style="width: 95%; height: 25px;" type="text"/>						

## DEPENDANTS

Certain rights are given by law to your spouse/common law spouse or civil partner, children and to anyone you are maintaining in whole or in part at the time of your death. Do you:

Have a spouse/common law spouse/civil partner/child who will not be included in your Will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Pay toward the maintenance of any person who will not benefit under your Will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If the answer to either of the above is 'Yes', please give details and reasons below:		
<div style="border: 1px solid black; width: 100%; height: 100%;"></div>		

### Details of Children

Children of 1st named applicant

Name	Date of Birth

Are step children included?

Yes
  No

If 'Yes' name children of 1st named applicant

Name	Date of Birth

If 'Yes', name children of spouse/civil partner/partner (2nd named applicant)

Name	Date of Birth

*Continue on separate sheet if necessary*

## Funeral instructions

You can complete this section if you have any particular preferences. You may include any special instructions in the space below:

1st named applicant

Burial

Cremation

2nd named applicant

Burial

Cremation

Special Instructions:

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## GUARDIANS

If you have any children who are under 18 years of age you may appoint guardians to look after them in the event of the death of you (and your spouse).

<b>Full Name of First Guardian(s)</b> <input type="text"/>	<b>Full Postal Address:</b> <input type="text"/>
<b>Daytime Tel No:</b> <input type="text"/>	
<b>Full Name of Second Guardian(s)</b> <input type="text"/>	<b>Full Postal Address:</b> <input type="text"/>
<b>Daytime Tel No:</b> <input type="text"/>	

*Consider a substitute if one dies or is unable to act*

## GIFTS

Many people will wish to make gifts of money or special items to those close to them. These are known as “legacies”. What is left of your possession after you have made these gifts is known as “residue”.

You should now consider which gifts you wish to make.

## GIFTS OF MONEY

Please list any gifts of specific items or money that you wish to make in your Will.

## 1st Legacy

Full name and full address of person, organisation or charity to whom you wish to make a gift, along with the amount or description.

<b>Name:</b> <input type="text"/>	<b>Relationship to you:</b> <input type="text"/>
<b>Organisation/Charity:</b> <input type="text"/>	<b>Amount of legacy:</b> £ <input type="text"/>
<b>Full Postal Address:</b> <input type="text"/>	<b>Description of item(s):</b> <input type="text"/>

If a gift is to a child, at what age should he or she receive it?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Should the gift be made on your death?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of both you or your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

## 2nd Legacy

Full name and full address of person, organisation or charity to whom you wish to make a gift, along with the amount or description.

<b>Name:</b> <input type="text"/>	<b>Relationship to you:</b> <input type="text"/>
<b>Organisation/Charity:</b> <input type="text"/>	<b>Amount of legacy:</b> £ <input type="text"/>
<b>Full Postal Address:</b> <input type="text"/>	<b>Description of item(s):</b> <input type="text"/>

If a gift is to a child, at what age should he or she receive it?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Should the gift be made on your death?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of both you or your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

### 3rd Legacy

Full name and full address of person, organisation or charity to whom you wish to make a gift, along with the amount or description.

<b>Name:</b> <input type="text"/>	<b>Relationship to you:</b> <input type="text"/>
<b>Organisation/Charity:</b> <input type="text"/>	<b>Amount of legacy:</b> £ <input type="text"/>
<b>Full Postal Address:</b> <input type="text"/>	<b>Description of item(s):</b> <input type="text"/>

If a gift is to a child, at what age should he or she receive it?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Should the gift be made on your death?	<input type="checkbox"/> 18	<input type="checkbox"/> 21	<input type="checkbox"/> 25
Should the gift be made on the death of both you or your spouse/civil partner/partner?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A

## THE RESIDUE OF YOUR ESTATE

The “residue” of your estate, which may be the main bulk of your estate, is what is left after your debts, taxes and any gifts listed in the following sections. You must now consider who will receive the residue of your estate. Will it be your spouse, your children, a charity? The possibilities are endless, but we have identified the 3 most common ways of dealing with the residue of an estate. Read them carefully and choose **one** which best suits you. If you are in doubt, say so and we will advise.

**SELECT ONE ONLY: (3)**

- I wish to leave all the “residue” of my estate to my partner, but if he/she dies before me, to the people named below in equal shares.
- I wish to leave all the “residue” of my estate to my partners, but if he/she dies before me, to the people named below in the percentages indicated.
- I wish to leave all the “residue” of my estate to the person(s) or organisations listed below in the percentages indicated.

**Remember, the totals must add up to 100%**

Name: <input style="width: 95%;" type="text"/>		Address: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
State any relationship to you: (son, niece, friend, etc). <input style="width: 95%;" type="text"/>		
Age: <input style="width: 50%;" type="text"/>	(if applicable) <input style="width: 50%;" type="text"/> %	

Name: <input style="width: 95%;" type="text"/>		Address: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
State any relationship to you: (son, niece, friend, etc). <input style="width: 95%;" type="text"/>		
Age: <input style="width: 50%;" type="text"/>	(if applicable) <input style="width: 50%;" type="text"/> %	

Name: <input style="width: 95%;" type="text"/>		Address: <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
State any relationship to you: (son, niece, friend, etc). <input style="width: 95%;" type="text"/>		
Age: <input style="width: 50%;" type="text"/>	(if applicable) <input style="width: 50%;" type="text"/> %	

*Continue on separate sheet if necessary.*

## Children of your Beneficiaries

If any person to whom you make a gift in your will dies before you, do you wish that person's children to inherit their parent's share?  Yes  No

Young beneficiaries will not be entitled to their inheritance earlier than the age of 18. However, if you wish, you can defer this entitlement to a later age, but for tax reasons it is not advisable to use an age over 25.

I wish young beneficiaries to become entitled at the age of:  18  21  25

Should you and your immediate family be involved together in an accident and your deaths occur close together, please indicate below who your estate should pass to:

Please give the full names and full addresses of each individual (including children), charity etc. and the proportion you wish to leave to each.

<b>Name:</b> <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/> %
<b>Full Postal Address:</b> <input style="width: 95%; height: 50px;" type="text"/>	<b>Current age if under 25:</b> <input style="width: 95%; height: 50px;" type="text"/>

<b>Name:</b> <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/> %
<b>Full Postal Address:</b> <input style="width: 95%; height: 50px;" type="text"/>	<b>Current age if under 25:</b> <input style="width: 95%; height: 50px;" type="text"/>

<b>Name:</b> <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/> %
<b>Full Postal Address:</b> <input style="width: 95%; height: 50px;" type="text"/>	<b>Current age if under 25:</b> <input style="width: 95%; height: 50px;" type="text"/>

<b>Name:</b> <input style="width: 95%; height: 20px;" type="text"/>	<input style="width: 95%; height: 20px;" type="text"/> %
<b>Full Postal Address:</b> <input style="width: 95%; height: 50px;" type="text"/>	<b>Current age if under 25:</b> <input style="width: 95%; height: 50px;" type="text"/>



## ADDITIONAL INFORMATION AND DECLARATION

Please use the space provided below for any special instructions or information you feel may be relevant for the preparation of your Will(s)

# DECLARATION

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Please ensure this Declaration is completed and signed and then return the completed form to Will Expert Limited in the enclosed pre-paid envelope.

Please prepare a Will for me based on the instructions contained in this form.

This was completed by myself  or

**I understand that:**

- The information requested in this form is required for the purpose of preparing my Will and to ensure that my Will reflects my wishes.
- The information is being used by Will Expert Limited who are responsible for preparing the Will.
- Will Expert Limited may contact me to confirm my instructions.
- Information about me will be put on the database of Will Expert Limited and used by Will Expert Limited in servicing my relationship with them and monitoring service levels.
- Will Expert Limited will charge for its services for acting as Executor after my death in accordance with its scale of fees.

I certify that the information given in this form is true and complete and correctly represents my wishes.

**Please note:**

- An additional charge will arise after your Will has been prepared, should you make any alterations to your wishes that necessitate Will Expert Limited re-drafting your Will. Please therefore carefully check that this form does reflect your wishes and that nothing has been left out.
- Will Expert Limited reserve the right to make an additional charge if the nature of the instructions are such that time over and above what they would consider to be a reasonable time for preparing a Will is expanded in completing your Will. You will be advised of the estimated additional charge before any work is undertaken.
- Your details are held by Will Expert Limited who is the data controller.
- You have the right of access to your personal records held on our files by written request to Will Expert Limited, 117 Chorley Road, Swinton, Manchester M27 4AA and on payment of a fee.

## Keeping you informed

Will Expert Limited may use the information on this form to provide you with details of selected products and services by post or by telephone. If you do not want this, please tick this box

By providing your email and/or mobile telephone number below, you are agreeing to receive offers or communications by email or mobile/SMS from Will Expert Limited

Email Address:

Mobile Telephone Number:

## GIVING YOUR CONSENT

It is important that you read this page carefully as, by signing this application, you agree that we can use your information in this way.

Please note that if you do not provide either an email address or mobile telephone number, we will not be able to tell you about additional benefits available to our customers.

### Method of payment

Please select which type of Will you wish to complete:-

Single Will

Mirror Wills

Discretionary Trust Mirror Wills

**Cheque** – made payable to **Will Writing Expert Limited**

Upon completion of this form please send to **enquiries@will-expert.co.uk**  
Or post to **Will Writing Expert Ltd, 117 Chorley Road, Swinton, Manchester M27 4AA**

### LET US GIVE YOU MORE FREE ADVICE

If you have a pension/investments or money you are thinking of investing then please consider what level of return you already get/think you will get. If your return is/will be less than a 6% per annum then it would be beneficial for you to have some free advice from Financial Portfolio Ltd. It is completely no obligation advice and it may assist you greatly. We will pass your details onto Financial Portfolio Ltd and they will gladly give you a phone call or send you an email to see if they can be of assistance. If you do not wish to be contacted by them, please tick the box below.

I DO NOT WISH TO BE CONTACTED BY FINANCIAL PORTFOLIO

**CLIENT IDENTITY**  
Council of Mortgage Lenders Requirements  
Money Laundering Regulations 2007  
Law Society Requirements

Each client is to provide **certified copies** of two forms of identification; one document from List A below and one document from List B.

**List A**

- a valid full passport; or
- a valid H M Forces identity card with the signatory's photograph; or
- a valid UK Photo-card driving licence

**List B**

- a firearm and shot gun certificate; or
- a receipted utility bill less than three months old; or
- a council tax bill less than three months old; or
- a council rent book showing the rent paid for the last three months; or
- a mortgage statement from another lender for the mortgage accounting year just ended; or

Please remember that certified copies of these documents are needed, **please do not send in original documents**. Copies can be certified by your financial adviser or any other professional person (eg teacher, bank manager, accountant, doctor).

If you are in difficulty in providing the documents requested please contact us straight away.