**Will Writing Instruction Form**

**How to Complete our form:**

# Please read the information below carefully before completing.

* Please donotuse abbreviations.
* Identify all people by their full legal names.
* Many questions can be answered with a YES or NO.
* Please ignore any sections that do not apply to you
* Please use continuation sheets if necessary.
* We ask how a person named is related to you, examples may be; sister, step daughter, brother-in-law, friend
* Lastly, please do not worry if you do not have all the information on the sheet. We understand you may need advice based on some sections. Please save the document and attach in an email and send to [contact@futurelegal.co.uk](mailto:contact@futurelegal.co.uk).

|  |  |  |  |
| --- | --- | --- | --- |
| Your DetailsA Testator is the person(s) making the Will.Throughout the document you will be referred to as T1 OR T2, this depends on the person’s name entered in each section below. If you are making a Will on your own, please ignore any T2 questions. | | | |
| T1 Details | | | |
| Title | Dr/Mr/Miss/Mrs/Ms | Marital Status |  |
| Full name(s) |  | Occupation |  |
| Surname |  | Contact Number |  |
| Gender |  | Email Address |  |
| Home Address |  | Intention to Marry? |  |
| Post Code |  | Existing Will? |  |
| Date of Birth | / / | How did you hear about us? |  |
| T2 Details | | | |
| Title | Dr/Mr/Miss/Mrs/Ms | Marital Status |  |
| Full name(s) |  | Occupation |  |
| Surname |  | Contact Number |  |
| Gender |  | Email Address |  |
| Home Address |  | Intention to Marry? |  |
| Post Code |  | Existing Will? |  |
| Date of Birth | / / |  |  |

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| **ESTATE VALUATION**  **Inheritance tax and probate advice related** | | **JOINTLY**  **OWNED ASSETS** | **T1** | **T2** |
| Main residence:  Sole Owner, Joint Ownership or Tenants in common? | |  |  |  |
| Additional properties;  Sole Owner, Joint Ownership or Tenants in common? | |  |  |  |
| Additional properties;  Sole Owner, Joint Ownership or Tenants in common? | |  |  |  |
| Foreign assets - real estate | Country: |  |  |  |
| Life policies - not written into trust | |  |  |  |
| ISAs (cash) | |  |  |  |
| ISAs (stocks and shares) | |  |  |  |
| Pension and Death in Service benefits | |  |  |  |
| Shares | |  |  |  |
| Unit trusts/investment bonds | |  |  |  |
| Business assets: sole trader/husband-wife partnership | |  |  |  |
| Business assets: partnerships/shareholdings | |  |  |  |
| Bank/Building Society savings | |  |  |  |
| Chattels (items of personal use) | |  |  |  |
| Cars | |  |  |  |
| Other | |  |  |  |
| **GROSS TOTAL ESTATE VALUE** | |  |  |  |
|  | |  |  |  |
| **Less liabilities** | |  |  |  |
| Mortgage(s) | |  |  |  |
| Loans (including credit and store cards) | |  |  |  |
| Other | |  |  |  |
| TOTAL LIABILITIES | |  |  |  |
| TOTAL ESTATE VALUE | |  |  |  |
| LESS TOTAL LIABILITIES | |  |  |  |
| **NET VALUE OF ESTATE** | |  |  |  |

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| ChildrenPlease name your children in this section.If you need to name your children elsewhere on this document later, you can simply write Child 1 for example. | | | |
| Child 1 | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | Age |  |
| T1 Relation |  | T2 Relation |  |
| **Child 2** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | Age |  |
| T1 Relation |  | T2 Relation |  |
| **Child 3** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | Age |  |
| T1 Relation |  | T2 Relation |  |
| **Child 4** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | Age |  |
| T1 Relation |  | T2 Relation |  |

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| **EXECUTORS**  An executor is named in the Will as responsible for dealing with the estate. They may have to apply for special legal authority before they can have access, this is known as probate.  We recommend you appoint a minimum of two executors; however, you can have a maximum of four working together.  An executor in the Will can also be named as a beneficiary, although you cannot have a beneficiary as an executor if you require their money to be held in trust. An executor must be over the age of 18, however we do advise based on the responsibility of the role to choose wisely. | | | | |
| Would you like to be each other’s 1st choice Executor?  If yes, the person(s) below will only act if you are both unable to do so. | | | Yes/No | |
| **Executor 1.** | | | | |
| Title |  | Home Address | |  |
| Full name(s) |  | Postcode | |  |
| Surname |  | T1 Relation | |  |
| Email address |  | T2 Relation | |  |
| To act on their own or joint? | Sole /Jointly with…. | | | |
| **Executor 2** | | | | |
| Title |  | Home Address | |  |
| Full name(s) |  | Postcode | |  |
| Surname |  | T1 Relation | |  |
| Email address |  | T2 Relation | |  |
| To act on their own or joint? | 2nd choice as Sole /Jointly with….. | | | |
| **Executor 3** | | | | |
| Title |  | Home Address | |  |
| Full name(s) |  | Postcode | |  |
| Surname |  | T1 Relation | |  |
| Email address |  | T2 Relation | |  |
| To act on their own or joint? | 3rd choice as Sole /Jointly with…. | | | |

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| **Funeral Arrangement** | | | |
| T1 | | | |
| Do you want to specify any funeral arrangements? | Yes/No | Is T1 a registered organ donor? | Yes/No |
| Does you wish to be buried or cremated? | Cremated/Buried | Please state any other funeral wishes requirements: |  |
| T2 | | | |
| Do you want to specify any funeral arrangements? | Yes/No | Is T1 a registered organ donor? | Yes/No |
| Does you wish to be buried or cremated? | Cremated/Buried | Please state any other funeral wishes requirements: |  |

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| **Guardian(s)**  A legal guardian is someone who has the legal authority to take of a child until they child reaches the legal age of 18. | | | |
| **Guardian 1** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | T1 Relation |  |
|  |  | T2 Relation |  |
| To act on their own or joint? | Sole /Jointly with…. | | |
| **Guardian 2** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | T1 Relation |  |
|  |  | T2 Relation |  |
| To act on their own or joint? | 2nd choice as Sole /Jointly with….. | | |
| **Guardian 3** | | | |
| Title |  | Home Address |  |
| Full name(s) |  | Postcode |  |
| Surname |  | T1 Relation |  |
|  |  | T2 Relation |  |
| To act on their own or joint? | 3rd choice as Sole /Jointly with…. | | |

**SECTION 7: BUSINESS INTERESTS**

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| **Business Interests** | | | |
| **T1** | | | |
| **Do you have any business interests?** | Yes/No | Sole Trader or Limited Company? | Sole Trader / Limited Company |
| Notes |  | | |
| **T 2** | | | |
| **Do you have any business interests?** | Yes/No | Sole Trader or Limited Company? | Sole Trader / Limited Company |
| Notes |  | | |

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| **Gifts of Money of Items.**  Please enter the following details of beneficiaries below. | | | | | |
| Sum / Item |  | | | | |
| Gift from? | T1/T2/ T1&T2 | | | | |
| Title | Full Name | T1 Relation | | T2 Relation | Address: |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | | |  |
| Notes |  | | | | |
|  | | | | | |
| Sum / Item |  | | | | |
| Gift from? | T1/T2/ T1&T2 | | | | |
| Title | Full Name | T1Relation | | T2 Relation | Address: |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | |  |  |
| Mr/Mrs/Miss |  |  | |  |  |
| Notes |  | | | | |
|  | | | | | |
| Sum / Item |  | | | | |
| Gift from? | T1/T2/ T1&T2 | | | | |
| Title | Full Name | T1 Relation | T2 Relation | | Address: |
| Mr/Mrs/Miss |  |  |  | |  |
| Mr/Mrs/Miss |  |  |  | |  |
| Mr/Mrs/Miss |  |  |  | |  |
| Mr/Mrs/Miss |  |  |  | |  |
| Notes |  | | | | |

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| **Estate Distribution**  Please name all beneficiaries and percentages of the estate below: | | | | | | | |
| Will the estate pass to each other? | | | | Yes/No | | | |
| Would you like advice on protecting the estate against re-marriage or unnecessary care home fees? | | | | Yes/ No | | | |
| Would you like advice on bloodline planning, a vulnerable person or a beneficiary going through a divorce? | | | | Yes/ No | | | |
| **Title** | **Full name** | **T1**  **Relation** | **T2**  **Relation** | | **Address** | **Percentage %** | **Age of Inheritance** |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Mr/Mrs/Miss |  |  |  | |  |  |  |
| Notes |  | | | | | | |

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| **ESTATE** **DISTRIBUTION- optional**  **This section would cover the event if the above gifts failed.**  Please name all beneficiaries and percentages of the estate below: | | | | | | |
| **Title** | **Full name** | **T1**  **Relation** | **T2**  **Relation** | **Address** | **Percentage %** | **Age of Inheritance** |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Mr/Mrs/Miss |  |  |  |  |  |  |
| Notes |  | | | | | |

**ADDITIONAL INFORMATION:** Use this section to detail any information you consider helpful in the drafting and completion of the Wills and other documents.