**Will Writing Instruction Form**

**How to Complete:**

# PLEASE READ CAREFULLY BEFORE COMPLETING.

(This includes all accompanying notes for each section.)

1. You must complete this form fully.
2. **DO NOT** use abbreviations.
3. Identify **ALL** people by their **FULL NAMES**, surnames last.
4. Many questions can be answered with a YES or NO.
5. Please delete/leave any sections that do not apply to you
6. Additional legacies can be listed on a supplementary sheet. You must clearly state which section of this form will include additional information.
7. Please use continuation sheets if necessary.
8. Italics mark descriptions.

9.Lastly, please do not worry if you do not have the information on the sheet. We understand you may need advice based on some section. We kindly ask for this to be emailed across to us at [contact@futurewills.co.uk](mailto:contact@futurewills.co.uk) to help us and yourself on your appointment.

# SECTION 1 TESTATORS DETAILS

# A Testator is the person(s) making the Will.

**First Testator Details**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender |  |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| Date of Birth | / / |
| Marital Status |  |
| Occupation |  |
| Intention to Marry? | YES/NO |
| Existing Will? | YES/NO |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ESTATE VALUATION** | | **JOINT OWNED ASSETS** | **1ST**  **TESTATOR** | **2ND**  **TESTATOR** |
| Main residence/Additional properties:  **Are you joint owners or Tenants in common?** Joint/TIC | |  |  |  |
| 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 VALUES** | |  |  |  |

**SECTION 2: ESTATE (Inheritance tax and probate advice related)**

LESS liabilities

|  |  |  |  |
| --- | --- | --- | --- |
| Mortgage(s) |  |  |  |
| Loans (including credit and store cards) |  |  |  |
| Other |  |  |  |
| TOTAL LIABILITIES |  |  |  |
| **TOTAL ESTATE VALUE** |  |  |  |
| **LESS TOTAL LIABILITIES** |  |  |  |
| **NET VALUE OF ESTATE** |  |  |  |

**SECTION 3: CHILDREN**

|  |  |
| --- | --- |
| Title | Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address?  If same as yours, please type T1 |  |
| Post Code |  |
| Age |  |
| T1 Relationship |  |
| T2 Relationship |  |

|  |  |
| --- | --- |
| Title | Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address?  If same as yours, please type T1 |  |
| Post Code |  |
| Age |  |
| T1 Relationship |  |
| T2 Relationship |  |

|  |  |
| --- | --- |
| Title | Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address?  If same as yours, please type T1 |  |
| Post Code |  |
| Age |  |
| T1 Relationship |  |
| T2 Relationship |  |

|  |  |
| --- | --- |
| Title | Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address?  If same as yours, please type T1 |  |
| Post Code |  |
| Age |  |
| T1 Relationship |  |
| T2 Relationship |  |

**SECTION 4: EXECUTOR**

What is an **Executor**? An **executor** of **an estate** is an individual(s) appointed to administer the estate of a deceased person. We recommend having a minimum of two Executors.

**Executor 1.**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| T1 Relationship |  |

**Executor 2.**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| T1 Relationship |  |

**Executor 3.**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| T1 Relationship |  |

**SECTION 5: FUNERAL ARRANGEMENT**

**T1 Funeral Arrangements**

|  |  |
| --- | --- |
| **QUESTION** |  |
| Does Testator 1 want to specify any funeral arrangements? | Yes/No |
| Does Testator 1 wish to be buried or cremated? | Cremated/Buried |
| Is T1 a registered organ donor? | Yes/No |

Please state any other funeral wishes requirements:

**SECTION 6: GAURDIAN(S)**

A legal guardian is someone who has the legal authority to take care of a **child** should anything happen to the parents. Guardians are responsible for taking all parental decisions until a child reaches the age of 18.

**Guardian 1**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| T1 Relationship |  |
| T2 Relationship |  |

**Guardian 2**

|  |  |
| --- | --- |
| Title | Dr/Mr/Miss/Mrs/Ms |
| Full Name |  |
| Gender | Male/Female/Other |
| Home Address |  |
| Post Code |  |
| Contact Number |  |
| Email Address |  |
| T1 Relationship |  |
| T2 Relationship |  |

**SECTION 7: BUSINESS INTERESTS**

|  |  |
| --- | --- |
| **QUESTION** | **YES/NO** |
| Does Testator 1 have any business interests? |  |
| Does Testator 1 wish to grant the trustees power to carry on business? |  |

**SECTION 8: GIFTS OF MONEY/GIFTS**

Gift 1

|  |  |  |
| --- | --- | --- |
| **Sum / Item** |  | |
| **Please enter the following details of beneficiaries below:** | | |
| **Title** | **Full Name** | **Address:** |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| **Notes** |  | |

Gift 2

|  |  |  |
| --- | --- | --- |
| **Sum / Item** |  | |
| **Please enter the following details of beneficiaries below:** | | |
| **Title** | **Full Name** | **Address:** |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| **Notes** |  | |

Gift 3

|  |  |  |
| --- | --- | --- |
| **Sum / Item** |  | |
| **Please enter the following details of beneficiaries below:** | | |
| **Title** | **Full Name** | **Address:** |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| Mr/Mrs/Miss |  |  |
| **Notes** |  | |

**SECTION 8: ESTATE** **DISTRIBUTION**

Please name all beneficiaries and percentages of the estate below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Title** | **Full name** | | **Address** | **Relation** | **Percentage %** |
| 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 |  |  | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Title** | **Full name** | | **Address** | **Relation** | **Percentage %** |
| 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 |  |  | | | |

Please name all beneficiaries and percentages of the estate below, if you’d like to cover the event if all of the above predeceased too:

Please find on the next page a box of which you can complete with any questions or additional information you may find useful.

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