

PLEASE COMPLETE THIS FORM TO HELP US PREPARE YOUR WILL

Please indicate your main reason(s) for wishing to have a new Will drawn up:

- Succession – ie. making sure the correct people inherit from you;
- Inheritance tax issues;
- Guardianship of your children;
- Other issues (please specify):

1. Family Details			
Full Name:		Date of Birth:	
Address:		<i>Telephone</i>	
		Day:	
		Evening:	
Email:			
Occupation:		Full Name of Spouse or Partner:	
Full Names of Children, and Addresses if different from above			
<u>Name</u>	<u>Address</u>	<u>Date of Birth</u>	

2. Question for Widows and Widowers		
Please let us know your late husband or wife's full name, the date they died and details of who dealt with their estate		
<u>Full Name(s)</u>	<u>Date of death</u>	<u>Who dealt with their estate</u>

3. Guardians	
If you have children under 18 you may wish to appoint guardians in the event of the death of both parents. Please give the guardians' details here:	
<u>Full Name(s)</u>	<u>Address(es)</u>

4. Executors

These are the people who will carry out the wishes expressed in your Will. They also have to make sure that all of your debts and taxes have been paid and that they have claimed all available inheritance tax exemptions. You may choose one or more people and you should choose a substitute in case your first choice is unable to act. You may choose professionals such as partners in the firm of Nockolds LLP or family and friends, or a combination of any of these. If you appoint the Partners in the firm then we are able to offer free secure storage for your Will.

Full Name(s) & Address(es)

Spouse

Other

Partners in the firm of Nockolds LLP.

Can we write to your executors?	YES	NO
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5. Assets

Please give a brief summary of your assets. For each asset that you own please can you tick one of the columns S (your sole ownership) or Jt (jointly owned by you and your partner). Your partner should complete a separate form. We may be able to advise you on ways of minimising any tax liability. Please use additional sheet if needed.

Asset	S	Jt	Name of asset	Value
Bank a/c				
Building Society				
Shares/Gilts				
Premium Bonds				
National Savings Certs.				
ISAs/PEPs/TESSAs				
Pension				
House			amount of mortgage outstanding?	
House			amount of mortgage outstanding?	
Car(s)				
House Contents /Jewellery				
Life insurance/ Bonds		Who is the beneficiary of the Fund?		

Please also give details of any foreign property you may own

If you own a business please give details and clarify whether you would wish the business to continue if you or any other owner die

6. Specific gifts

Please give details of any gifts of cash or other personal items and the names and addresses of the recipients. If any gifts are to children please state the age at which they should inherit.

Eg. "I give £100 to Tom when he reaches 18"; or "I give the car I own at my death to Dick"; or "I give my house to Harry". If you do not wish to make any gifts of this nature, please move on to Section 7.

7. Your Residuary Estate

Any remaining property which has not been given specifically will form part of your residuary estate.

Please give full names and addresses of the people you wish to inherit this remaining property.

Please specify the age at which any children should inherit e.g. 18, 21 or 25.

Please also give details of the people you would like to receive the above property should the people mentioned above do not survive you.

8. Funeral Wishes

You may wish to specify your funeral wishes such as burial or cremation. In any case it is advisable to mention your wishes to your family or executors.

Some clients pre-pay for their funerals and set out their wishes in a funeral plan. If you have done this, or if you would like information about these plans, please let us know.

And Finally :

(1) Have you made a Will before? YES NO

If so, where is your current Will?

(2) I would like to know more about Powers of Attorney YES NO

(3) I would like to know more about Living Wills YES NO

(4) How do you know about Nockolds LLP?

I am an existing client

I have been recommended by one of your clients

I am a relation of an existing client

Other (please specify)

If you would like to discuss your Will in more detail please phone Nockolds LLP on 01279 755777 to speak to someone in our Wills, Probate Tax & Trusts Team, when we will be able to check your requirements and discuss your Will in more detail.

We will advise you of the cost of your Will(s) at our meeting. Please note that if you decide not to proceed with making a Will we will instead make a charge based on our time spent with you.

Secure storage of your Will

Please let us know if you wish to take advantage of Nockolds LLP secure storage facility. We can provide you with a copy of your Will and hold the original in our strong room. The service is offered free of charge where Nockolds LLP are appointed as your Executors. There is an annual nominal charge in other cases.