

CAMPIONS SOLICITORS **WILLS INSTRUCTION FORM**

Please can you complete and return by email. If this is a single Will please complete one column only.

CLIENT ONE

CLIENT TWO

ABOUT YOU:

MR MRS MISS MS
OTHER:

MR MRS MISS MS
OTHER:

SURNAME:

SURNAME:

FIRST NAME:

FIRST NAME:

ALL MIDDLE NAMES:

ALL MIDDLE NAMES:

CONTACT TELEPHONE NUMBER(S):

CONTACT TELEPHONE NUMBER(S):

CURRENT ADDRESS:

CURRENT ADDRESS:

EMAIL ADDRESS:

(Please use one email address only.)

Have you made a previous Will? If yes please give details.

Have you made a previous Will? If yes please give details.

Yes No

Yes No

Have you made an Enduring or a Lasting Power of Attorney under which an Attorney acts for you? If yes please give details.	Have you made an Enduring or a Lasting Power of Attorney under which an Attorney acts for you? If yes please give details.
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you married?	Are you married?
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you been divorced?	Have you been divorced?
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you separated?	Are you separated?
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you ever been bankrupt?	Have you ever been bankrupt?
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any children?	Do you have any children?
Full Name(s): Address(es) (if different to above) Age(s):	Full Name(s): Address(es)(if different to above) Age(s):
CHILDREN (CONT) Can you please state the following: <ul style="list-style-type: none"> ▪ If any of the above children is not a child to you both please state and give further details ▪ If either child suffers from a physical or mental disability could you please state and give details ▪ Can you state whether any of the above children are married and further if they have children. ▪ Can you give the names and ages of those children 	

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DIRECTIONS AS TO YOUR WILL

(1) DIRECTIONS AS TO BURIAL/CREMATION

One of the initial clauses is usually a direction as to whether or not you would like your body to be cremated or buried and whether your ashes should be buried or scattered in any particular place. Please indicate below your instructions. **(Please note that you should advise your family and friends of your preferred funeral arrangements because your Will might not be read until after your funeral).**

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(2) DIRECTIONS AS TO MEDICAL RESEARCH

You can leave your body to medical science for research and teaching purposes. If you wish to do so, please indicate below:

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(3) DIRECTIONS AS TO APPOINTMENT OF EXECUTORS

Your executor is the person responsible for carrying out the terms of your Will. Generally, people appoint their spouse/partner as their Executor so long as they survive you. Thought should also be given, however, to the situation that would arise on your death if your spouse/partner has predeceased you. In addition, of course, you will need to consider the position if you do not have a spouse or partner. We give you the following guidance.

- (i) If there are minor children to whom money is left then the Executors will have the care of the children's money and that could become a substantial responsibility. There should be at least two for each Will.
- (ii) It is generally better to have Executors who are younger than you and obviously they should be reliable and responsible. There is no reason why beneficiaries or your children (if they are adults) should not be Executors.
- (iii) If money is left to children under 18 you would need at least two Executors.

With that in mind do you have details of any Executors? Please give their full names and addresses:

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When considering Executors you can always appoint a Solicitor from this firm as Executor. However, we will make a charge for this which will be payable out of your estate. Therefore we do generally recommend that you consider other suitable people before ourselves but if you are in difficulties over this then please indicate below:

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(4) PROVISION AS TO SPOUSE/PARTNER

Unless the estate is unusually large, most people give their entire estate to their spouse or partner. However, there are exceptions. If you have been married before and you have children of that marriage, such children may be excluded by giving the entire estate to the current spouse/partner. To avoid this you could divide your estate between children of the first marriage and the current spouse/partner. However, we would urge you to be very cautious about such a situation. In our experience, where such gifts are made there can be two problems. Firstly there is potential for conflict between the current spouse/partner and the children of the first marriage. Secondly, unless the current spouse/partner has substantial monies of their own, they may find they face great financial difficulties unless they inherit the entire property. We would urge that in these situations life assurance is considered.

Do you wish to make provision for your spouse/partner?

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If there is a divorce or separation do you wish to make a statement as to why you are not leaving money to your spouse or former spouse?

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(5) DIRECTIONS AS TO APPOINTMENT OF TESTAMENTARY GUARDIANS

If you have minor children you should appoint Testamentary Guardians. Subject to the provisions of the Children Act, Testamentary Guardians can have residence of your children and thus be responsible for their day to day care. You can appoint the same people as you appointed as Executors, but clearly very special consideration needs to be given to this since it may be your last chance to say who will look after your children in the event of your death.

There are two key situations. If you are a single parent with minor children you need to consider what would happen to your children after your death. If you have a spouse/partner then you may be happy for your spouse/partner to look after your children but you should still consider what would happen to your children in the event of the death of your spouse/partner.

Do you have any instructions for Testamentary Guardians?

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(6) DIRECTIONS AS TO MAKING PECUNIARY OR DEMONSTRATIVE LEGACIES

A pecuniary legacy is a gift of a certain sum of money, an example would be:

“I give the sum of £500.00 to my cousin John”.

A demonstrative legacy is a gift of specific funds or shares, an example being:

“I give all of the money in my Nottingham Building Society savings account to my cousin Peter”

Both types of gifts can be given to individuals, organisations or charities.

Do you have any such legacies in mind? Please put any instructions that you may have including the full name and address of the beneficiary together with the amount to be given and, where applicable, the particular fund from which it is to be paid.

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(7) DIRECTIONS AS TO PERSONAL EFFECTS/HOUSEHOLD CONTENTS

The legal definition for such items is “chattels”. There are a number of different ways of dealing with chattels as set out below:

- (i) You may not wish to mention them at all. If this is the case then your chattels will form part of your residuary estate. Your residuary estate is essentially what is left after all your debts have been paid and all gifts have been made.
- (ii) You may wish to ask that your Executors divide your chattels as they deem appropriate and give them to whomever they choose.
- (iii) You may wish to direct your Executors by a separate letter that can be placed with your Will. This is not as binding as being in your Will but is more flexible because you can of course alter the letter without needing an amendment to your Will.
- (iv) You may wish to make specific gifts of items of particular sentimental value or substantial value. If so, please indicate below any instructions that you may have including the full name and address of the beneficiary together with the item to be

given

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Bear in mind, of course, that it may be your wish that all your chattels go to your spouse/partner but you should consider provisions for the unfortunate eventuality that your spouse/partner predeceases you.

Please confirm your instructions with regard to all chattels, which are not the subject of specific gifts as set out above.

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(8) YOUR PROPERTY

In the majority of Wills properties are dealt with as part of the residuary estate. Sometimes, however, it is appropriate to make specific provisions with regard to the home. This is of particular importance if you are the sole owner of the property but share it with other occupiers.

For instance, you may not wish to give the property to an adult child but may nevertheless want to allow the adult child to remain there for a certain period of time. If this situation applies to you, please indicate your instructions if any:

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(9) THE RESIDUARY ESTATE

The residuary estate is all of the estate that has not been disposed of by any of the previous types of gifts or legacies. Please note that as stated at the beginning of this form, all debts, bills and funeral expenses are paid from the estate first of all.

The size of the residuary estate therefore depends on how much of your estate has already been given away. If you have made a specific gift to each and every friend and member of your family then the residuary estate is not likely to be very large. If however, you require a very simple Will, along the lines of "I appoint my husband to be my executor and I leave everything to him absolutely", then your residuary estate will consist of everything except the deductible expenses as outlined above.

Please indicate below to whom you would like to give your residuary estate:

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THE RESIDUARY ESTATE (CONT)

We now need to consider to whom you would like to give your residuary estate should the person named above predecease you. Please consider the following:

- (i) If you have children you may wish to leave your residuary estate to your children in equal shares. If your children have not reached the age of eighteen the money would be held by your Executors to hold on your children's behalf.
- (ii) Painful as it may be you do need to consider the position if your children predecease. In those circumstances we need to consider the following:
 - (a) Where you have more than one child, whether you would like the deceased child's share to pass equally to your remaining children.
 - (b) Particularly in the case of an adult child or an only child you should consider whether you wish the deceased child's share to go to his or her children in equal shares (i.e. the parent's share would pass to your grandchildren)
 - (c) Whether the share that your child or children would have taken should go to somebody else altogether.
- (iii) You may not have children and may wish the residuary estate to go elsewhere. You may have brothers or sisters or other persons whom you may wish to benefit.

Do you have any instructions regarding the above points?

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The next and final matter to consider is that there may be a beneficiary who is not able physically or mentally to deal with any money that he or she may be left. In those circumstances a protective trust may have to be set up leaving the money that person would inherit to another person on their behalf. **If this is relevant please give us instructions.**

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B. Schedule of Assets

- **Property**

Do you own the house in which you live?	
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no please give the full name of the owner:	
Is the Property a Joint Tenancy or Tenancy in Common (if known)?	
Joint Tenancy <input type="checkbox"/>	Joint Tenancy <input type="checkbox"/>
Tenancy in Common <input type="checkbox"/>	Tenancy in Common <input type="checkbox"/>
Unknown <input type="checkbox"/>	Unknown <input type="checkbox"/>
What is the estimated value of the property?	
£	£
What is the amount of mortgage outstanding against the property (if any)?	
£	£
Will that mortgage be paid off by a Life Policy/Mortgage Protection Policy in the event of you or your spouse or partner's death?	
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Amount that may be payable on death (if known)?	
We do advise you at this point that you may need to contact the Life Company direct to see whether the proceeds of the policies form part of your estate or whether they fall outside the estate (for instance if they are written in trust for the children). This may be relevant for the purposes of Inheritance Tax.	
£	£

- **Pensions**

In any pension scheme there may be a return of contributions paid or alternatively there may be life assurance provisions in the event of death prior to receiving pensions. That money may come into the general estate or sometimes it may not. You do need to check exact provisions with the pension scheme provider and whether or not you will need to give directions to the Trustees or Managers of the pension scheme.

Please give brief details of your pension if any. Does it provide death in service benefit and, if so, how much benefit will your estate receive?

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▪ **Other Land or Buildings**

Please provide details and value of any other land or buildings and whether or not they are in joint names:

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▪ **Bank and Building Society Accounts**

Please provide details and value of any bank or building society accounts and state whose name(s) the accounts are in:

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▪ **Shares/Unit Trusts/Investments/Bonds/PEPs/ISAs**

Please provide details and value of any of the above and whose name(s) the accounts are in:

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▪ **Other**

Please provide details and value of any of other assets and whose name(s) the accounts are in:	

We would be grateful if you tell us how you first heard about us. This is important because it helps with our marketing:	
Existing Client	<input type="checkbox"/>
Recommendation (if professional please specify)	<input type="checkbox"/>
Internet	<input type="checkbox"/>
Facebook	<input type="checkbox"/>
Other (Please specify)	<input type="checkbox"/>