



Getting Ready for your Will Appointment

Below is a list of the information you will need to have to hand when we meet for your Will appointment.

If you could get as much of this together in advance of our meeting then this will shorten our appointment considerably and enable me to give detailed advice at our first meeting.

1. Names and Addresses of people in the Will

- Your full name, date of birth, date of marriage (if applicable) and address including Postcodes.
- Your partners full name and date of birth.
- The full names, dates of birth and addresses including postcodes of all children.

2. Appointment of Executors

Executors are persons whom you appoint in your Will to carry out your wishes and administer your Estate. You may consider appointing your spouse/partner with additional or substitute Executors.

This is a responsible position with some duties imposed by law and therefore you might consider appointing a professional Executor.

An Executor can be a beneficiary under your Will.

Please have your Executors full names and addresses including postcodes or leave blank to discuss.

3. Summary of your Assets / Liabilities

Your Home

- What is its approximate value?
- Name of mortgage lender (if applicable)
- Approximate amount outstanding on mortgage
- How many years are left on your mortgage?

Other properties

- Holiday homes both in the UK and abroad.
- Buy to Let properties etc.

Savings

- List of saving accounts with amounts.

Life insurance Policies

- Name of insurance Company
- Single or Joint Policy
- Sum Assured
- Monthly Premium
- Connected to mortgage - Yes/No
- Start/End Date

List of Debts

- Approximate amount owed
- Monthly repayment
- How long until it is repaid
- Name of Creditor
- Loan/Credit Card/Other

5. Funereal Wishes

Is it your wishes to be buried, cremated or no preference

6. Appointment of Guardians (if you have children)

If you have any children under the age of 18, you should consider appointing at least one guardian.

When one parent dies, the surviving parent normally becomes the Legal Guardian, but it is of course possible that both parents could die together or you may be a single parent.

Where a man is not married to the mother of his children he will not automatically become their guardian on the death of their mother.

7. Bequests

- Do you wish to leave sums of money to a particular person or charity?
- Are there any specific items (for example jewellery) which you wish to leave to a particular person?
- Please have to hand the recipient's full names and addresses where possible. In the case of a charity the charity number will be required.

8. Residuary Estate

Who would you want to receive your estate on first death, second death etc

If you are a family with children who would you want to receive your estate if you were all killed say in a car accident.