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| RCS Logo | **Simple Will Planner** |

Please fill in this form to provide us with the details required to draft your Will. Don’t worry if you can’t fill in all the boxes, just try to fill in all the ones applicable to your circumstances.

**PARTICULARS OF YOU AND YOUR FAMILY**

|  |  |
| --- | --- |
| **1.** | **Your Personal Details** |
| **1.a** | Your Full Name(s) | **1.d** | Home phone number: |
|  | Prefix: |  |  |  |
|  | First Name:  |  | **1.e** | Work phone number: |
|  | Middle Name(s): |  |  |  |
|  | Last Name:  |  | **1.f** | Mobile phone number: |
|  | Previous Name?: |  |  |  |
| **1.b** | Your Address | **1.g** | Email address: |
|  |  |  |  |
|  |  | **1.h** | Date of Birth: dd/mm/yyyy |
|  |  |  |  |
|  |  | **1.i** | Place of Birth: |
|  |  |  |  |
| **1.c** | Marital Status (please cross X ): | **1.j** | Country of Residence: |
|  |  | Single |  | Separated |  |  |
|  |  | Engaged |  | Divorced | **1.k** | Location of previous Will (if any): |
|  |  | Married |  | Remarried |  |  |
|  |  | Civil Partnership |  | Widowed |  |  |
|  |  |  |  |
| **2.** | **Details of your Spouse/Partner** |
| **2.a** | Full Name(s) | **2.d** | Home phone number: |
|  | Prefix: |  |  |  |
|  | First Name: |  | **2.e** | Work phone number: |
|  | Middle Name(s): |  |  |  |
|  | Last Name: |  | **2.f** | Mobile phone number: |
|  | Previous Name?: |  |  |  |

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| **2.b** | Their Address (if different) | **2.g** | Email address: |
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|  |  | **2.h** | Date of Birth: dd/mm/yyyy |
|  |  |  |  |
|  |  | **2.i** | Place of Birth: |
|  |  |  |  |
| **2.c** | Marital Status (please cross X ): | **2.j** | Country of Residence: |
|  |  | Single |  | Separated |  |  |
|  |  | Engaged |  | Divorced | **2.k** | Location of previous Will (if any): |
|  |  | Married |  | Remarried |  |  |
|  |  | Civil Partnership |  | Widowed |  |  |
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| **3.** | **Details of any children** |
| Full Name(s) | Address (if different from yours) | Date of birth | Status \* |
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| *\* Please indicate if children are not from present relationship and whether natural, adopted, step-child or illegitimate* |

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| **4.** | **Details of any Guardians** |
| Full Name(s) | Address & email | Relationship to you |
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| *Consider a substitute if one dies or is unable to act.* |

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| **5.** | **Details of any grandchildren** |
| Full Name(s) | Address | Date of birth | Name(s) of parents(s) |
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| **5.** | **Details of any grandchildren continued** |
| Full Name(s) | Address | Date of birth | Name(s) of parents(s) |
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| **6.** | **Details of all dependents** |
| Full Name(s) | Address | Date of birth | Relationship to you/your spouse/partner |
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**CONTENTS OF YOUR WILL**

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| **7.** | **Executor(s)** |
| Your Executors are responsible for administering your estate. You can appoint up to four Executors. We recommend you appoint someone who knows your situation well (i.e. spouse), as often they are aware of your assets and the whereabouts of your papers. You may also wish to appoint another person to act alongside them to reduce the administrative burden at this difficult time. We can be appointed as an Executor and would be happy to act in this capacity. By appointing a professional Executor (i.e. us) you can have peace of mind that your estate will be administered correctly, but it is not mandatory, just recommended. |
| On your death |
| Full Name(s) | Address | Relationship to you |
| **i.** |  |  | Spouse/Relative/Friend  |
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| **ii.** |  |  | Spouse/Relative/Friend |
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|  |  |  |  |
| **iii.** | Routh Clarke Solicitors | 11, Head Street | Solicitors |
|  |  | Tintinhull |  |
|  |  | Somerset |  |
|  |  | BA22 8QH |  |
| **iv.** |  |  |  |
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| On the death of Your Spouse/Partner |
| Full Name(s) | Address | Relationship to you |
| **i.** |  |  | Relative/Friend etc. |
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| **ii.** | Routh Clarke Solicitors | 11, Head Street | Solicitors |
|  |  | Tintinhull |  |
|  |  | Somerset |  |
|  |  | BA22 8QH |  |

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| --- | --- | --- |
| Full Name(s) | Address | Relationship to you |
| **iii.** |  |  |  |
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| **iv.** |  |  |  |
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| **8.** | Trustees |
| A Trustee can also be an Executor. A Trustee is a person who holds your property on behalf of your beneficiaries while your estate is being administered and holds your estate for the benefit of any beneficiaries who are children until they reach the age of eighteen. If your Will creates a discretionary trust on the first or second death, your Trustees will make decisions regarding investing the trust assets and the distribution of capital and income to your beneficiaries. You can provide guidance to your Trustees in a separate letter of wishes, which is non-legally binding. So, it is important you choose your Trustees carefully and trust them to carry out your wishes as detailed in your letter of wishes. We recommend you appoint a maximum of 3 and a minimum of 2 Trustees and you appoint someone who knows you well (such as spouse) as one of your Trustees. We also recommend a 'neutral' Trustee is appointed (e.g. a trusted friend or advisor) who is not a beneficiary under your Will. We can be appointed to act as Trustee if wished, as we have taken your instructions and drafted your Will, we can ensure your wishes are carried out and your estate is dealt with in the most tax efficient way. |
| On your death |
| Full Name(s) | Address | Relationship to you |
| **i.** |  |  | Spouse/Relative/Friend  |
|  |  |  |  |
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| **ii.** |  |  | Spouse/Relative/Friend |
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|  |  |  |  |
| **iii.** | Routh Clarke Solicitors | 11, Head Street | Solicitors |
|  |  | Tintinhull |  |
|  |  | Somerset |  |
|  |  | BA22 8QH |  |

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| On the death of Your Spouse/Partner |
| Full Name(s) | Address | Relationship to you |
| **i.** |  |  | Relative/Friend etc. |
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|  |  |  |  |
| **ii.** | Routh Clarke Solicitors | 11, Head Street | Solicitors |
|  |  | Tintinhull |  |
|  |  | Somerset |  |
|  |  | BA22 8QH |  |
| **iii.** |  |  |  |
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| *If it is intended to leave a gift to any of your Executors and/or Trustees please include the details in section 10 or 11 below and indicate whether the gift is conditional on acceptance of the appointment.* |

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| **9.** | **Funeral/burial/cremation requirements/organs or medical use:** |
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| **10.**  | **Gifts of money** |
| Beneficiary Full Name(s) | Address & email | Amount £ |
| **i.** |  |  |  |
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| **ii.** |  |  |  |
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| **11.**  | **Specific gifts** (e.g. House, car, jewellery, antiques, etc.) |
| Beneficiary Full Name(s) | Address & email | Description of item(s) |
| **i.** |  |  |  |
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| **ii.** |  |  |  |
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| **12.**  | **The remainder of your estate** (i.e. everything which is left after specific gifts & gifts of money) |
| If you are married or have a civil partnership, it is usual for your spouse/civil partner to inherit the remainder of your estate on your death and this is what we will assume. If this is not your intention, please detail who you wish to inherit the remainder of your estate. |
| On your death |
| Beneficiary Full Name(s) | Age at which they inherit (i.e. 18, 21, etc) | Proportion of residuary estate | If they die before you, passes to their children? |
| **i.** |  |  |  |  |
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| **ii.** |  |  |  |  |
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| **iii.** |  |  |  |  |
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| **iv.** |  |  |  |  |
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| On the death of your spouse/partner |
| Beneficiary Full Name(s): | Age at which they inherit (i.e. 18, 21, etc) | Proportion of residuary estate | If they die before you, passes to their children? |
| **i.** |  |  |  |  |
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|  | Beneficiary Full Name(s) | Age at which they inherit (i.e. 18, 21, etc):Proportion of residuary estate | Proportion of residuary estate | If they die before you, passes to their children? |
| **ii.** |  |  |  |  |
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| **iii.** |  |  |  |  |
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| **iv.** |  |  |  |  |
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| **13.** | **Who will inherit your estate if neither your family nor those listed in 12 above survive you?***(Please note: if the beneficiaries in this situation are extensive and/or include, for example, charitable beneficiaries, we may have to charge additional fees on a time-spent basis)* |
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| **14.** | **Please indicate if any of the following apply** (Please cross X) |
| **i.** | Your total assets exceed £650,000 (for you & your spouse) or £325,000 (if a single Will is required) |  | Yes |  | No |
| **ii.** | You have children from a previous relationship |  |  |  |  |
| **iii.** | You pay maintenance to a former spouse or children of a previous relationship |  |  |  |  |
| **iv.** | You have a pre-nuptial agreement? |  |  |  |  |

**DETAILS OF YOUR PROPERTY/ASSETS**

|  |  |
| --- | --- |
| **15.** | **Details of your Estate** |
|  |  | Brief details | House value | Mortgage value | Your share % | Other share % |
| i. | Main residence, address and location of title documents |  |  |  |  |  |
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|  | Do you own your main residence jointly with your spouse or anyone else? (Please cross X) |  | Yes |  | No |
|  | If yes, please indicate on what basis they are owned? (Please cross X) |  | Joint Tenants |
|  |  | Tenants in Common |
|  |  | Sole Name |
|  |  | Unknown |
|  |  | Brief details | House value | Mortgage value | Your share % | Other share % |
| ii. | List any other properties owned in the UK - holiday homes or investment properties |  |  |  |  |  |
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| iii. | Do you own your other properties jointly with your spouse or anyone else? (Please cross X) |  | Yes |  | No |
|  | If yes, please indicate on what basis they are owned? (Please cross X) |  | Joint Tenants |
|  |  | Tenants in Common |
|  |  | Sole Name |
|  |  | Unknown |
|  |  | Brief details | Value of your interest | Value of your spouse/partner's interest |
| iv. | Business / Business property |  |  |  |
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|  |  |  |  |
| v. | Agricultural property (including land and buildings) |  |  |  |
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|  |  |  |  |
|  |  | Brief details | Value of your interest | Value of your spouse/partner's interest |
| vi. | Stocks & Shares |  |  |  |
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| vii. | Unit Trusts |  |  |  |
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| viii. | Bank accounts |  |  |  |
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| ix. | Building Society accounts |  |  |  |
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| x. | National Savings accounts |  |  |  |
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| xi. | Life Policies |  |  |  |
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| xii. | Foreign property/assets |  |  |  |
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| xiii. | Are there Wills in place that deal with your foreign assets? |  | Yes |  | No |
|  | If yes, where are these Wills? (Please provide address/details) |
|  |  |
|  |  |
|  |  | Brief details | Value of your interest | Value of your spouse/partner's interest |
| xiv. | Details of any property in trust of which you are:  | 1. A beneficiary
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|  | 1. Have a Power of Attorney
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| xv. | Have you made any gifts of money/assets in last 14 years? |  | Yes |  | No |
|  | If yes, please give details of Recipients: | Date of gift | Value of gift |
|  | a. |  |  |  |
|  | b. |  |  |  |
|  | c. |  |  |  |
|  | d. |  |  |  |
|  | e. |  |  |  |
|  | f. |  |  |  |
|  | g. |  |  |  |
| xvi. | Do you have a pension policy in place? (Please cross X) |  | Yes |  | No |
|  | If yes, please indicate type of pension? (Please cross X) |  | Self Employed |
|  |  |  | Personal |
|  |  |  | Ocupational |
|  |  |  | Other |
|  | Please provide details of arrangements for nominating pension death benefits (i.e. letter of wishes) |
|  |  |
|  |  |
|  |  | Brief details | Value of your interest | Value of your spouse/partner's interest |
| xvii | Any other relevant financial information? |  |  |  |
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| **16.** | **Additional comments or relevant information:** |
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| **17.** | **Your Instructions** |
| 1. I hereby instruct Routh Clarke Solicitors to act on my behalf in preparing a Will as per my instructions.
2. I authorise Routh Clarke Solicitors to provide any interested party with such details, as they need, to deal with my Will.
 |
| Signed |  | Dated: |  |
| Print Name |  |  |
| Signed |  | Dated: |  |
| Print Name |  |  |

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| **Glossary of Terms** |
| Whilst we try to keep the amount of legal speak to a minimum, some is unavoidable. Descriptions of some of words which may be used are: |
| **Beneficiary** | A person named in your will who will gain some benefit within it. |
| **Chattels** | These are generally personal items which are not used for business purposes. For example jewellery, grandfather clocks etc but also includes household items like washing machines, beds etc but excludes money or securities for money though. |
| **Conditional gift** | These are gifts which will be given to nominated people provided they satisfy the condition(s) for it. For example a gift to a proposed executor on the condition they take up the position of being a/the executor. |
| **Estate** | Everything you own (in part or completely) falls within your estate and should be dealt with within your will. What will be distributed however will be everything less any debts. |
| **Executors [female form = Executrix]** | People who you will carry out the instructions contained within your will. They can be selected to act on their own (Sole Executor) or jointly with other nominated executors. They cannot be forced to become executors so you should discuss this with them first. |
| **Guardians** | People who will take over the legal responsibility for your children (if under 18) on your death |
| **Interest** | This means some form of benefit from something within your will, for example a house. There are various forms of interest. * **Interest absolute** – a person who is given an absolute interest can deal with that interest as they like – it is quite simply absolutely theirs. For example if the interest was a house they could sell it.
* **Life interest** – this is where the interest is only given during their life in which case the things they can do with it are limited. For example the house to a spouse and thereafter the children. The spouse has a life interest and the children a contingent interest. The spouse cannot sell the house without the children's permission (as it will go to them on the spouse's death) but the children cannot generally force the spouse to sell it either (as the spouse has rights to it whilst the spouse is alive).
* **Contingent interest** – where the interest in the property will only arise when a contingency or condition arises. In the example above the children's contingent interest will arise when the spouse dies.
 |
| **Legacy** | What you are giving to people in your will. It generally can be *specific* (i.e. a particular piece of jewellery); *pecuniary* (i.e. money); or *residuary* (see remainder/residue below |
| **Life time gifts** | These are significant monetary or other gifts that you have made to others during your life although only the last 14 years is critical. |
| **Natural children** | Children who are of full blood relationship with you |
| **Predecease** | Where a beneficiary dies before the Testator |
| **Property** | Where a beneficiary dies before the Testator |
| **Remainder/Residue** | After you have given what you specifically want to give to people, there may be some elements of your estate remaining undistributed. This residue or remainder can then be dealt with in general or specific terms. For example, "the remainder of my estate to…". However, for tax and other purposes it is absolutely critical that there is a remainder beneficiary. |
| **Testator [female form Testatrix]** | You, i.e. the person making the Will |