

Simple Will Planner

Client Name:

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.c	Marital Status (please cross X):		1.j Country of Residence:
	<input type="checkbox"/> Single	<input type="checkbox"/> Separated	
	<input type="checkbox"/> Engaged	<input type="checkbox"/> Divorced	1.k Location of previous Will (if any):
	<input type="checkbox"/> Married	<input type="checkbox"/> Remarried	
	<input type="checkbox"/> Civil Partnership	<input type="checkbox"/> 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?:		

2.b	Their Address (if different)			2.g	Email address:	
				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:	
	<input type="checkbox"/>	Single		<input type="checkbox"/>	Separated	
	<input type="checkbox"/>	Engaged		<input type="checkbox"/>	Divorced	2.k
	<input type="checkbox"/>	Married		<input type="checkbox"/>	Remarried	
	<input type="checkbox"/>	Civil Partnership		<input type="checkbox"/>	Widowed	
					Location of previous Will (if any):	

3. Details of any children			
Full Name(s)	Address (if different from yours)	Date of birth	Status *

** Please indicate if children are not from present relationship and whether natural, adopted, step-child or illegitimate*

4. Details of any Guardians

Full Name(s)	Address & email	Relationship to you

Consider a substitute if one dies or is unable to act.

5. Details of any grandchildren

Full Name(s)	Address	Date of birth	Name(s) of parents(s)

5. Details of any grandchildren continued

Full Name(s)	Address	Date of birth	Name(s) of parents(s)

6. Details of all dependents

Full Name(s)	Address	Date of birth	Relationship to you/your spouse/partner

CONTENTS OF YOUR WILL

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
ii.			Spouse/Relative/Friend
iii.	Routh Clarke Solicitors	11, Head Street Tintinhull Somerset BA22 8QH	Solicitors
iv.			

On the death of Your Spouse/Partner

	Full Name(s)	Address	Relationship to you
i.			Relative/Friend etc.
ii.	Routh Clarke Solicitors	11, Head Street Tintinhull Somerset BA22 8QH	Solicitors

	Full Name(s)	Address	Relationship to you
iii.			
iv.			

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
ii.			Spouse/Relative/Friend
iii.	Routh Clarke Solicitors	11, Head Street Tintinhull Somerset BA22 8QH	Solicitors

On the death of Your Spouse/Partner

	Full Name(s)	Address	Relationship to you
i.			Relative/Friend etc.
ii.	Routh Clarke Solicitors	11, Head Street Tintinhull Somerset BA22 8QH	Solicitors
iii.			

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.

9. Funeral/burial/cremation requirements/organs or medical use:

10. Gifts of money

	Beneficiary Full Name(s)	Address & email	Amount £
i.			
ii.			
iii.			
iv.			
v.			
vi.			
vii.			

11. Specific gifts (e.g. House, car, jewellery, antiques, etc.)

	Beneficiary Full Name(s)	Address & email	Description of item(s)
i.			
ii.			
iii.			
iv.			
v.			
vi.			
vii.			

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.				
ii.				
iii.				
iv.				

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.				

	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.				
iii.				
iv.				

Who will inherit your estate if neither your family nor those listed in 12 above survive you?
13. *(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)*

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)	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
ii.	You have children from a previous relationship	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
iii.	You pay maintenance to a former spouse or children of a previous relationship	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
iv.	You have a pre-nuptial agreement?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

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				
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				
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				
v.	Agricultural property (including land and buildings)				

Brief details		Value of your interest	Value of your spouse/partner's interest
vi.	Stocks & Shares		
vii.	Unit Trusts		
viii.	Bank accounts		
ix.	Building Society accounts		
x.	National Savings accounts		
xi.	Life Policies		
xii.	Foreign property/assets		
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 2. Have a Power of Attorney		
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.			
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	
			Occupational	
			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?			

16. Additional comments or relevant information:

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17. Your Instructions

- a. I hereby instruct Routh Clarke Solicitors to act on my behalf in preparing a Will as per my instructions.
- b. 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			

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	<p>This means some form of benefit from something within your will, for example a house. There are various forms of interest.</p> <ul style="list-style-type: none"> • 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 <i>specific</i> (i.e. a particular piece of jewellery); <i>pecuniary</i> (i.e. money); or <i>residuary</i> (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