

**BESPOKE  
WILL WRITING  
SERVICE**

# KEARNEY SEFTON

## SOLICITORS

### Part A - You and your family

#### 1. Your details

Your full name:

Your date of birth:

Your occupation:

Your address:

Work telephone  
number:

Home number:

Mobile number:

Your Email address:

If you (or any member of your family) is known by any other name and/  
or own any other assets in a different name, please give full details:

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### 2. Your husband/ wife/ civil partner/ partner

Their full name:

Their date of birth:

Their occupation:

### 3. Marriage/ partnership details

Year of marriage/  
civil partnership:

If you are not married to, or in a civil partnership  
with your partner please tick the box:

If you intend to marry/ re-marry/ enter into a civil  
partnership in the near future please tick the box:

Have either of you been married/  
in a civil partnership before:

Yes

No

### 4. Your Children (including any from previous marriage/relationship)

Their full name:

Their date of birth:

Their address  
(if different from yours):

Their full name:

Their date of birth:

Their address  
(if different from yours):

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### 5. Children of your husband's/wife's/previous marriage/relationship

Their full name:

Their date of birth:

Their address

(if different from yours):

Their full name:

Their date of birth:

Their address

(if different from yours):

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children
- Children excluded from benefit under your will may have the right to claim a share of your property in certain circumstances. Please ask for advice if this may be relevant.

## Part B - Your home and other assets

### 6. Your home

Is your home: (Please check appropriate box)

Owned - In your name alone

Owned -

In the name of your husband/ wife/ partner alone

Rented

Other (e.g. provided by a relative)

Owned -

In joint names with your husband / wife/ partner

Approximate value:

Details of  
outstanding  
mortgage or other  
secured loans

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### 7. Your business

Do you have your own business?

Yes

No

If yes, state the type of business:

Company

Partnership/ LLP

In your sole name

Please state the name of the business and approximate value:

### 8. Assets held in your name

Please list your other main assets, along with approximate values:

### 9. Assets held jointly with another

Do you have any jointly-owned assets? If yes, please give a general description, approximate values and name(s) of the other owner(s)

**Note:** jointly-owned assets generally pass to the joint owner automatically and cannot be given away by will

### 10. Do you own any assets abroad?

If yes, please give details:

### 11. Pensions and life Assurance (including your Death in Service Benefit)

Please list these and give approximate value:

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### Part C - Funeral, executors, guardians

#### 12. Funeral

You may specify in your will if you wish to be:  Buried  Cremated  No preference

#### 13. Executors

You must appoint executors to carry out instructions in your will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend. Executorship involves responsibilities and you should ask the people who you would like to act before naming them in your will.

Please list at least two and no more than four chosen executors:

Name:

Address:

Name:

Address:

Name:

Address:

Name:

Address:

Would you like partners from our firm to act as your executor(s)?

Yes

No

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### 14. Guardians

You should appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the other parent are both dead. The position may be different if you are a single parent. Guardianship involves considerable responsibility and you should ask people to agree to act before appointing them.

Please list chosen guardians:

Name:

Address:

Name:

Address:

Name:

Address:

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### Part D - Beneficiaries

The main part of your estate is called 'the residue'. (This is dealt with at question 17.) Before giving away the residue, you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or charities. These will be known as 'beneficiaries'.

You may also wish to consider a gift or trust as a tax-planning measure.

#### 15. Cash Gifts

Please give the names and addresses of the beneficiary and the amount to be given, with the age of anyone who is under 18.

Name:

Address:

Amount:

Name:

Address:

Amount:

Name:

Address:

Amount:

Name:

Address:

Amount:



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### 16. Gifts of Articles

You can include a clause in your will referring to a separate letter of wishes in relation to your possessions. This means that you can amend and add to your wishes at any time without the need to alter your will.

If you wish this clause to be included please tick here

Alternatively we can include legacies of specific items in your will. Please give the name and addresses of the people to whom you wish to leave specific items, and a full description of the article to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he/she will not be given a substitute item or the cash equivalent.

Name:

Address:

Article:

Name:

Address:

Article:

Name:

Address:

Article:

Name:

Address:

Article:

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### 17. The Residue

This is all that you own with the exception of most joint-owned property and gifts made in questions 15 and 16.

Please state who is to receive the residue on your death and who is to receive it should that person die before you.

The following are the more common provisions. If you wish to use one of these please tick the relevant box. If not, please go to question 18.

- Everything to my husband/wife/partner (named at question 2) outright, but if he/she has died then to my children (named in question 4), equally.
- Everything equally to my existing children (named in question 4) and to any other children I might have.
- To my husband/wife/partner (named in question 2), but if he/she has died before me, to the person(s)/ organisation(s) named below. If not in equal shares, then show the share each is to take.

Person(s)/ Organisation(s) Name

Share


### Gifts to Children

If there are gifts to children, we may suggest that if any of them should die before you, leaving children of their own, those children (i.e. your grandchildren) will inherit their parent's share. You may wish to consider using trusts for tax planning purposes.

Children under 18 cannot receive their entitlement until they reach the age of 18 but you may wish to extend that age in any event to say, 21 or 25. In some cases you may wish to use a trust to protect your estate.

Please tick the age at which you would like your children to inherit:

18  21  25

Tick here if you would like to discuss this further

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We would strongly recommend that you include here your instructions for what is known as 'a common accident clause' which sets out what would happen to your estate in the event that something happened to you and all the beneficiaries indicated above. In the case of spouses it is recommended that this is your joint instructions to be included in both of your wills.

### 18 Other beneficiaries / common accident provisions

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares.

Name:

Address:

Share:

Name:

Address:

Share:

#### Notes:

- A will is usually completely cancelled if you marry or enter into a civil partnership after making it. You need to make another will immediately, or one that takes a forthcoming marriage or civil partnership into account.
- On divorce or dissolution of a civil partnership, gifts to your husband/wife/civil partner are cancelled, as is his/her appointment as executor, but the rest of the will stands. This can create problems and it is better to make a new will.
- If you are not making provisions for your husband/wife/civil partner, it is possible that he/she could make a claim against your estate. If this situation may apply, please ask us for further information.
- Please ask for any help or more information on any topic related to your will during your telephone consultation or by email.