

Personal Details

Mr/Mrs/Ms/Other Title

Surname:

Full forenames:

Date of birth:

Occupation:

Email address:

Home Telephone:

Mobile:

Full postal address:

Spouse/Partner's Details

Mr/Mrs/Ms/Other Title

Surname:

Full forenames:

Date of birth:

Occupation:

Email address:

Home Telephone:

Mobile:

Full postal address:

Marital Status (please tick appropriate boxes)

Single Divorced
 Married Widowed
 Separated Partner

Marital Status (please tick appropriate boxes)

Single Divorced
 Married Widowed
 Separated Partner

Is your permanent home in England or Wales? Yes No

If 'no' to above, please state which country

Do you have any financial dependants whom you **DO NOT** wish to benefit under the Will (e.g. spouse, former spouse or children)? Yes No

If 'yes' to above, who is this and, briefly, why do you wish them not to benefit?

Do you intend to marry or re-marry in the near future? Yes No

If 'yes' to above, would you like your new Will to take this into account since a marriage would otherwise revoke your Will? Yes No

Is your ability to read and sign your Will affected by any condition? Yes No

If 'yes' to above, please supply brief details

Have you been married before? Yes No

If you were married before, how did the marriage end? Death Divorce

How did you hear about KW/W's Will writing service?

Existing client Recommended by friend Recommended by professional adviser (write name below) Website Email Local advertising
 Other (please specify):

LASTING POWERS OF ATTORNEY

Have you prepared Lasting Powers of Attorney? Yes No

CHILDREN

YOUR CHILDREN

SPOUSE/PARTNER'S CHILDREN (IF FROM PREVIOUS RELATIONSHIP)

Name	Date of Birth	Name	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

EXECUTORS

Please indicate whom you wish to appoint as executors:

1. KWW sole 2. KWW jointly with spouse/partner 3. KWW jointly with another
4. Your spouse/partner but if they are unable to act, then KWW 5. Another option

If you have chosen Option 3 or Option 5 above, please supply the full names and addresses of the persons you wish to appoint as executors.

Full name of executor 1:	Full name of executor 2:
Relationship to you:	Relationship to you:
Full postal address:	Full postal address:
Email address:	Email address:

YOUR FUNERAL WISHES

	YOU	SPOUSE/PARTNER
Is it your wish to be buried or cremated?	Buried <input type="checkbox"/> Cremated <input type="checkbox"/> No preference <input type="checkbox"/>	Buried <input type="checkbox"/> Cremated <input type="checkbox"/> No preference <input type="checkbox"/>
Do you wish to donate your organs for transplantation?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wish to leave your body for medical research?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

YOUR ESTATE

YOUR ASSETS

YOU

SPOUSE/PARTNER

Do you hold any assets outside England and Wales?

Yes No

Yes No

If 'yes' to above, please give full details including location

Please specify if, in the past 7 years, you have made any gifts of sums of money or property the total value of which exceeded £3,000 in any one tax year

Yes No

Yes No

If 'yes' to above, please provide details

Are you to be the beneficiary under another will or intestacy?

Yes No

Yes No

YOUR ESTATE - ASSETS AND LIABILITIES

Now please enter the approximate current value of your assets and your spouse/partner's assets. Also list any outstanding liabilities such as loans or mortgages.

ASSETS	YOU	SPOUSE/PARTNER
Main Residence	£	£
Other Property	£	£
Cash/Bank Accounts	£	£
Investments	£	£
Business assets	£	£
Foreign assets	£	£
Pensions	£	£
Life assurance/insurance products	£	£
Trusts	£	£
Gifts made within past seven years	£	£
Total Assets	£	£
LIABILITIES		
Debts/Loans	£	£
Mortgages	£	£
Total Liabilities	£	£
NET ESTATE (Total Assets minus Total Liabilities)	£	£

Would you like a meeting with our Estate Planning Consultant who may be able to suggest how to save Inheritance Tax on your estate? Yes No

GUARDIANS

If you have minor children (under 18) you should consider appointing a guardian. If you wish to make a guardianship appointment, please give full details.

Is the guardianship to come into existence only after the death of your spouse/partner or immediately after your death?

YOU
Death of spouse/partner Immediately

SPOUSE/PARTNER
Death of spouse/partner Immediately

<p>Full name of first sole guardian:</p> <p>Relationship to you:</p> <p>Full postal address:</p> <p>Email address:</p>	<p>Full name of second guardian:</p> <p>Relationship to you:</p> <p>Full postal address:</p> <p>Email address:</p>
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You should consider a substitute if one dies or is unable to act. You should also consider how your selected Guardians will be able to look after your children, financially and practically.

LEGACIES

Are there any **SPECIFIC SUMS OF MONEY** you wish to leave to a particular person or charity? If so, please state the amount(s) you wish to leave and the full name(s) of the recipient(s) together with their address(es) and, if appropriate, relationship(s) to you. Gifts to charities are exempt from inheritance tax.

YOU

SPOUSE/PARTNER

Are there any **SPECIFIC ITEMS** you would wish to leave to a particular person? If so, please give the description of the items(s) and the full name of the recipient(s) together with their address(es), their relationship(s) to you and the approximate current value of the item. We are happy advise on specific arrangements concerning jewellery.

YOU

SPOUSE/PARTNER

THE RESIDUE OF YOUR ESTATE

The residue of your estate - which may be a substantial part of it - is what is left after the settling of your debts and taxes and the payment of legacies. You must now consider who will receive that residue. Below are some suggestions for dealing with it. Read them carefully and then **choose ONE** which best suits you. If you are in doubt, we will happily advise you.

I wish to leave all the residue of my estate to:

- My spouse/partner - but if he/she dies before me, to my children in equal shares
- My spouse/partner - but if he/she dies before me, to the people named below in equal shares
- My spouse/partner - but if he/she dies before me, to the people named below in the percentages indicated
- The person(s) or organisation(s) listed below in the percentages indicated
- None of the above - to be discussed

If the beneficiaries of your Will are young, you can direct that the funds are held for them when they attain a specific age. The executors have the power to distribute funds to them before then for their maintenance and education. Please indicate a suitable age below. We would suggest 18, 21 or 25.

Please provide names and addresses or residuary beneficiaries below, together with the percentage of the estate you would like to leave them. Remember, the total must add up to 100%. Please indicate the age you wish any minor beneficiary to attain before they received their share of the residue.

YOU

Beneficiary name, address & email:

%

Beneficiary name, address & email:

%

Beneficiary name, address & email:

%

SPOUSE/PARTNER

Beneficiary name, address & email:

%

Beneficiary name, address & email:

%

Beneficiary name, address & email:

%

If any person to whom you make a bequest in your Will dies before you, do you wish that the person's children have their parents' share Yes No

If 'yes' to above, would you like a meeting with our Estate Planning Consultant who may be able to show how to do this? Yes No

Are any of your beneficiaries mentally or physically handicapped? If so, please provide details below. Yes No

Signature: _____

Date: _____

Signature: _____

Date: _____