

Your Will Information Form

Vale Wills Ltd
Tel: 01446 774 383
Mobile: 07933 668432

Reference:

Initial appointment date:

Initial appointment time:

Fee quoted:

Part 1 **Information about you**

	Person one	Person two
Title:		
First name(s):		
Surname:		
Any other name by which you are known:		
Gender:		
Occupation:		
Address:		
Postcode		
Daytime telephone:		
Alternative telephone:		
Email address:		
Date of birth:		
Country of birth:		
Do you have an existing will?		
How did you hear about Vale Wills?		

Marital status:

	Client 1	Client 2
Single		
Engaged		
Married/Civil partner		
Separated		
Divorced		

Part 2 Children

Please provide full names, dates of birth and addresses of all children.

Full name:	Date of birth:	Gender:	Address:	Relationship to person one:	Relationship to person two:

	Yes	No
Do you wish to include any children who are not yet born? If yes, at what age would you like them to inherit?		

	Person one	Person two
If you have had a child who has predeceased you and has left children of their own, please provide details here.		

Additional notes:

.....

.....
.....

Guardians

If your children are under 18 years of age and you wish to appoint guardians for your children, please provide their details below.

If you do not wish to appoint guardians, please tick here.

Full name:	Address:	Relationship to person one:	Relationship to person two:

If you would like to appoint a substitute guardian, if the person of people named above are unable to take up the role, please provide their details below.

Full name:	Address:	Relationship to person one:	Relationship to person two:

Additional notes:

.....

.....

.....

.....

.....

Part 3 Assets and liabilities

Your assets	Person one	Person two	Joint
Main residence:	£	£	£
Business assets:	£	£	£
Agricultural assets:	£	£	£
Bank accounts:	£	£	£
Investments:	£	£	£
Death in service:	£	£	£
Life assurance/insurance policy:	£	£	£
Assets abroad:	£	£	£
Other assets: eg digital assets	£	£	£
Total assets	£	£	£

Your liabilities	Person one	Person two	Joint
Mortgage:	£	£	£
Other (e.g. loans, credit cards):	£	£	£
Total liabilities	£	£	£

Assets less your liabilities

	Person one	Person two	Joint
Your total assets:	£	£	£
Your total liabilities:	£	£	£
Assets minus liabilities	£	£	£

My property held jointly with another person is held as:

Joint tenants Tenants in common Not sure

Additional notes:

.....
.....
.....
.....
.....

Business/agricultural assets:

Please provide details of your assets, i.e. name of the business, the nature of the business (e.g. sole trader, partnership, limited company, limited liability partnership) and the extent of your share.

Notes:

.....
.....
.....

Assets abroad:

If you own assets outside of the United Kingdom please tell us about them here. *[The EU countries are: Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the UK.]*

Location of assets:

.....

Assets owned:

.....

Do you have a will in that country/those countries? YES / NO [delete as appropriate]

Additional notes:

.....
.....
.....
.....

Property which is already held in a trust

It may be that you are currently a beneficiary under a trust. If you do receive benefits under a trust you need to ascertain whether you are able to pass these benefits on in your will or whether the recipient in the event of your death has already been determined.

Are you a beneficiary of an existing trust? YES / NO [delete as appropriate]

Do you have a copy of the trust? YES / NO [delete as appropriate]

Please provide your understanding of your interest in the trust *here*:

.....
.....
.....

Part 4 Do you need a trust in your will?

A trust is an arrangement where some or all of your assets are not inherited immediately. Trusts can be used for a variety of purposes, from protecting the family home for future generations to providing a fund for a vulnerable loved one who is unable to look after their inheritance personally. Here we ask you to consider the bigger picture of your assets in the context of your circumstances, to discover whether you should consider including a trust in your will.

Please read each statement below and select 'yes' to any that apply. If you answer 'yes' to any of these statements you should consider a trust as part of your will.

1. I am concerned that my beneficiaries are too young to receive their inheritance.
YES / NO
2. I intend to benefit my unmarried partner with my estate and our combined estate is worth more than £325,000.
YES / NO
3. I have children from a previous relationship and a new spouse/partner, and I want to look after them both.
YES / NO
4. I am concerned that my spouse/partner may remarry after my death and my/our children's inheritance may be diminished as a result.
YES / NO
5. I am concerned that my beneficiaries' inheritance may be diminished as a result of my spouse/partner requiring long term care after my death.
YES / NO
6. I am concerned that one of my beneficiaries may squander their inheritance.
YES / NO
7. One of my beneficiaries has learning difficulties/a disability/are unable to manage their affairs for another reason and/or is in receipt of means tested benefits. **YES / NO**

8. One of my beneficiaries are at risk of divorce or bankruptcy proceedings.

YES / NO

9. I am currently married and have been previously widowed, and our combined estate is worth more than £650,000.

YES / NO

10. My spouse has previously been widowed, and our combined estate is worth more than £650,000.

YES / NO

11. My beneficiaries are wealthy in their own right. I would therefore like to make sure that they can benefit from my estate if they need to but that there is flexibility to skip a generation if they would like to.

YES / NO

Part 5 Your executor(s)

Your principal executors

	Name of person, organisation or charity	Address
1		
2		
3		
4		

Your substitute executors

	Name of person/ organisation or charity	Address
1		
2		
3		
4		

Additional notes:

.....

.....

.....

.....

.....

.....

.....

.....

Part 6 Legacies

Person one

If you wish to leave legacies, please provide details below.

If you do not wish to include legacies, please tick here.

	Amount/ description of item	Beneficiary	Relationship	Address	To inherit
1					18 21 25
2					18 21 25
3					18 21 25
4					18 21 25
5					18 21 25
6					18 21 25

Person two

If you wish to leave legacies, please provide details below.

If you do not wish to include legacies, please tick here.

	Amount/ description of item	Beneficiary	Relationship	Address	To inherit
1					18 21 25
2					18 21 25
3					18 21 25
4					18 21 25
5					18 21 25
6					18 21 25

Transport and insurance costs

Should these be paid from your residuary estate? **YES / NO**

Part 7 Your residuary estate

Principal beneficiaries

I wish to leave my residuary estate to my spouse or partner.

I wish to leave my residuary estate among the principal beneficiaries set out below.

	Full name of beneficiary	Address	Relationship	Share	To inherit
1					18 21 25
2					18 21 25
3					18 21 25
4					18 21 25
5					18 21 25
6					18 21 25

If any of the above die before you, do you want their children to receive their share? YES / NO

If yes, at what age?

Substitute beneficiaries

I do not wish to include substitute beneficiaries.

I wish to leave my residuary estate among the substitute beneficiaries set out below.

	Full name of beneficiary	Address	Relationship	Share	To inherit
1					18 21 25
2					18 21 25
3					18 21 25

4					18 21 25
5					18 21 25

If any of the above die before you, do you want their children to receive their share? YES / NO

If yes, at what age?

Catastrophe beneficiaries

I do not wish to include catastrophe beneficiaries.

I wish to leave my residuary estate among the catastrophe beneficiaries set out below.

	Full name of beneficiary	Address	Relationship	Share	To inherit
1					18 21 25
2					18 21 25
3					18 21 25
4					18 21 25
5					18 21 25

If any of the above die before you, do you want their children to receive their share? YES / NO

If yes, at what age?

Additional notes:

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Part 8 Other considerations

Animals

Do you have a pet? If so, who would you like to care for it in the event of both your deaths?

Details of pet(s)	Who should receive them?	Conditional gift in appreciation?

Additional notes:

.....

.....

.....

.....

.....

.....

.....

Funeral wishes

Person one:

.....
.....
.....

Person two:

.....
.....
.....

.....
.....
.....
.....