

INSTRUCTIONS

1. **ONLY FOR SIMPLE WILLS.** Please use BLOCK CAPITALS throughout. If in doubt call to book an appointment.
2. For a single Will complete the LEFT HAND columns only.
3. Circle your choice for YES/NO/N/A questions. Draw a line through any sections that do not apply to you.
4. The DECLARATION on the Back page must be completed and signed before the application can be processed.
5. Complete this form and send to Legacy Services with the correct payment.

PERSONAL DETAILS

YOURSELF	SPOUSE / PARTNER
MR / MRS / Miss / MS	MR / MRS / Miss / MS
Full Name	Full Name
Address	Address Post Code
Post Code	
Tel No (Home) (Work) (Mobile) (E-mail)	Tel No (Home) (Work) (Mobile) (E-mail)
Date of Birth	Date of Birth
Married / Single / Divorced	Married / Single / Divorced
If Single will you be married within the next 12 months.	YES / NO / N/A

EXECUTORS

These should be trustworthy UK citizens over the age of 18 years. They will carry out your wishes and look after anything left to someone under the age of 18 years. An Executor can also be a beneficiary. Legacy Services recommend that you have at least 2 Executors. If you require a professional executor you should not complete a DIY form. **4 Maximum.**

Do you want your spouse/partner as an Executor (normally yes) **YES / NO**

Do you want your other Executors as (joint for trusts) **RESERVE/JOINT**

Relationship to Yourself	Full Name Mr/Mrs/Miss/Ms	Address	Tel No	Relationship to spouse/partner

GUARDIANS

These are the people who will look after your minor children after your death. They should not normally be Executors. Appoint people acceptable to you both. **2 sets Maximum.**

Relationship to Yourself	Full Name Mr/Mrs/Miss/Ms	Address	Tel No	Relationship to spouse/partner

DO you want advice with regard to Inheritance Tax **YES / NO**

If YES Complete the Assets Record .

(Details will not appear in your Will & you will be contacted by our Financial sister company)

IHT/ASSET Record

	Yourself	Spouse/Partner	Joint	Totals
Approx. Property Value				
Outstanding Mortgage Repayment or Interest Only ?				
Mortgage Protection Life or Life + Critical illness ?				
Other life Insurance /100=£ per month. Is this enough ?				
Health Insurance (PHI) Does it include death benefit ?				
Critical Illness Insurance Does it include death benefit ?				
Annual Salary / Income				
Death in Service Benefit Employer - 3 X annual Salary ?				
Any Life cover in Trust ?				
SELF EMPLOYED ? Business Trust Required ?				
Partnership/Business Insurance Business Value/Assets				
Value of Personal Pension ? In Trust ?				
Savings ? Bank, Building Society etc..				
Investments ? Bond, PEP, ISA, Shares etc..				
Personal Belongings? Contents, Jewellery, Cars etc..				
Future Legacy ? IHT Advice needed ?				
Any Other ? 2nd / Holiday Home, etc..?				

Are you in Good health ? **Yes / NO** Do you Smoke ? **Yes / NO**

Are you concerned about loss of Assets if you go into care ? **Yes / NO**

Will your children's Guardians cope financially ? **Yes / NO**

Our in house Independent Financial Advisors have reduced our clients costs on a wide range of Insurance & Investment products. Do you wish to take advantage of a free consultation ? **Yes / NO**

We hold the property as Joint Tenants / Tenants in common (Delete as required)

Gifts / Legacies

Any specific gifts etc. to named people:-

Your Gifts etc. - 1st or 2nd death ?	Spouse/Partner Gifts etc.- 1st or 2nd death ?
Name & Relationship	Name & Relationship
Details:	Details:
Name & Relationship	Name & Relationship
Details:	Details:
Name & Relationship	Name & Relationship
Details:	Details:

Main Beneficiaries

Do you wish the remainder of you Estate to pass to your Spouse/partner and then to your Children and then to your grandchildren ? **YES / NO**

Beneficiaries to get equal shares ? **YES / NO**

Relationship to yourself	Full Name Mr/Mrs/Miss/Ms	Address	Tel No	Receive at age	% share	Relationship to spouse/partner

Reserve Beneficiaries

If all your main beneficiaries precede you what do you want to happen to your Estate?

If Charities - Charity No required. If people - Relationships required. Equal or % shares?

EXCLUSIONS

Do you need to exclude anybody from your Will ? :- Former Spouse ? Adult Child ? Etc.
Please note you cannot exclude anybody who is a financial dependant. **YES / NO**

Relationship to yourself	Full Name Mr/Mrs/Miss/Ms	Relationship to spouse/Partner

Medical Requests

Do you wish your organs to be used for Medical Transplant Surgery?

You: YES / NO	Spouse/Partner YES / NO
Comments?	Comments?

Funeral Requests

Do you wish to be :-

You: Cremated / Buried	Spouse/Partner: Cremated / Buried
Comments?	Comments?

Do you wish to include details of a pre arranged Funeral Plan ? **YES / NO**

Your Details:	Spouse/Partner Details:
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Extra Notes

Other Matters

COST £

I/we have requested a Web Will **Single (£50) / Double Will (£70)**

The previous pages have covered all the areas of a standard simple Will.

However Many people have circumstances that require trusts and/or related documents to be included and/or drawn up separately. All these non standard requirements have further costs involved and are beyond the scope of a Web Will. If you require any of the following you should not complete a DIY WILL. Please call to book an appointment with a consultant. Our standard prices will apply.

Examples are:-

A Property Trust (includes severance of Joint Tenancy if required)

A Discretionary Trust to be included in my Will

A Business Trust to be included in my Will

A Disabled or Other Trust

A Power of Attorney. Property & Financial or Health & Welfare

To leave instructions concerning my/our wishes should I/we suffer from a terminal/degenerative condition. An Advance Directive (Living Will)

I/we wish our Wills and related documents to be held in the Legacy Will safe scheme, to include:- Storage, copies, Executor notification, Annual reviews if required, telephone advice and free rewrites.

I/we wish our House Deeds to be included in the above scheme.

Sub Total £

Vat Reg No: 783 8650 82 VAT @ 20% £.....

TOTAL COST £.....

I/we require a Free Financial consultation **YES / NO**

A Financial leaflet from our sister company may accompany drafts etc.

I/we require a Pre paid Funeral Plan **YES / NO**

I/we have the following comments:-

Legacy Services 25 Barleymow Close, Chatham, Kent, ME5 8JZ 01634 669658

WEB Instructions Terms of Business

The following standard terms of business apply to all Web instructions accepted by the company. All work is subject to these terms and they form the basis of the contract between the Company and the client.

Definitions: The Term, 'the Company', shall mean *Legacy Services* / The Term, 'the Client' shall mean you; the term 'you' and 'your' shall mean 'the Client' / The Society shall mean The Society of Will Writers and Estate Planning Practitioners / For the purposes herein, Will or Wills shall include any other document as is prepared in accordance with your instructions.

1. Procedures

A Web Will is produced on an execution only basis. No advice has been sought or given.

2. The Company undertakes to:

- a) Draw up a legal Last Will and Testament from the instructions received.
- b) Dispatch your draft Will(s), by post, within 14 days of receiving your initial instructions. However, where circumstances occur which are outside of the Company's control which will result in a delay beyond this period, you will be given a full explanation and the opportunity to renegotiate the contract or cancel the agreement with a full refund being provided. If you decide to proceed the documents will be produced as soon as is possible. In any event the Company shall dispatch the draft Will(s) to you within 30 days of having received the initial instruction.
- c) Maintain the strictest confidentiality and not pass on your name or details to any other organization without your express written permission unless legally required to do so and shall comply with all legislation in force relating to data protection.
- d) Refund any money paid in respect of the preparation of your Will(s) should you change your mind within 7 days of sending instructions. After this the Company reserves the right to charge you for work carried out on your behalf and in accordance with your signed instructions. An itemized bill will be produced for any such charge falling due.
- e) Offer a chargeable Attestation Service that supervises the signing and witnessing of your Will(s) at your home. The Company will not take responsibility for ensuring the validity of your Will(s) where the Attestation Service has not been taken up and the execution supervised by an agent of the Company. The signing of your Will(s) (the Execution) must be carried out according to the law of England and Wales in order for your Will(s) to be valid. All Will(s) will be supplied to you with full written instructions of how these should be completed.

3. Your Obligations are:

- a) To disclose all relevant facts and answers to all questions asked to allow the company to produce an affective legal document. The Company shall not accept liability in respect of information which was not disclosed, and which comes to light at a later date as being of relevance and which may effect the validity or content of your Will(s).
- b) To read through the draft Will(s), and other draft documents provided, to confirm that the draft Will(s) correctly reflects your wishes as to the distribution of your estate and that the names and addresses of the persons mentioned in your Will(s) are correct, adding any missing data not supplied at the time of sending your instructions.
- c) To return the documents together with any amendments to the Company as soon as possible. If you fail to return the documents to the Company, the Company shall accept no liability for the draft Will(s) or delays caused.
- d) To notify the Company if you do not receive your draft Will(s) within two weeks of sending your instructions, unless otherwise agreed.
- e) To pay the Will Writing fee in full with the initial instructions.
- f) If having the (optional) Attestation Service, you should arrange for the Witnesses to be present for the execution of your Will. The cost of this service is dependent on your location.

4. Client Care

- a) The Company is committed to providing you with a high quality service. An essential part of that service is that we will communicate effectively with you and that you are kept informed of progress.
- b) The Company operates a full Customer Care Service of which all our staff are fully aware and the Company maintains a full complaints procedure to which any complaint should first of all be addressed. If the matter is unable to be resolved to your satisfaction you may refer it, in writing, to The Complaints Department, The Society of Will Writers, Eagle House, Exchange Road, Lincoln, LN6 3JZ
- c) The Company complies with the Society's Code of Practice of which a copy is available upon request

I/We accept the above terms of business and agree to abide by them and to be bound by them.
Please keep a copy of this agreement.

PLEASE READ THE ABOVE TERMS CAREFULLY AND ENSURE YOU UNDERSTAND BEFORE SIGNING

Signed:----- (1st Testator)

Print Name:-----

Signed:----- (2nd Testator)

Print Name:-----