

GIVING YOUR INSTRUCTIONS

PLEASE READ CAREFULLY BEFORE COMPLETING

1. You can complete this form yourself or with help from your Will Writing service. Please use **BLOCK CAPITALS** throughout. Do **NOT** use County abbreviations. Identify all people by their **FULL** names.
2. **CIRCLE** your choice for YES / NO / NA questions. Put a line through any sections that do not apply to you.
3. Details of additional Executors, guardians, legacies, beneficiaries and other special instructions can be completed on a supplementary sheet of paper. Please indicate clearly which section will include the additional information.
4. **DOUBLE CHECK** spellings of **ALL NAMES**.
5. The **DECLARATION** on page 9 must be signed and completed before your application can be processed.

Please tick

- [] Instructions for preparing a single Will (First Testator Only)
 [] Instructions for preparing 'mirror' Wills (First Testator and Spouse/Partner)

(1) Testator(s)

The Testator is the person making the Will. Write in your full names and surname. Your address (at the time of making the Will) also helps to identify you.

Yourself (Mr / Mrs / Miss / Ms)	Spouse / Partner / Fiancée (Mr / Mrs / Miss / Ms)
Surname _____	_____
Forenames _____	_____
Address _____ _____	_____
_____	_____

Telephone Number: _____

Marital Status:

Single/Married/Widowed/Separated/Divorced Single/Married/Widowed/Separated/Divorced

Date of Birth: ____ / ____ / ____

Date of Birth: ____ / ____ / ____

Yourself
(Mr / Mrs / Miss / Ms)

Spouse / Partner / Fiancée
(Mr / Mrs / Miss / Ms)

Are you blind or physically infirm?

YES / NO

YES / NO

If you are SINGLE do you want your Will written to include the partner named here as your future spouse?

If so, please indicate the DATE of the anticipated marriage. YES / NO / NA _____

Do not choose 'YES' unless a wedding is definitely booked within the next 12 months.

(2) Executors

Executors do the work of administering your Estate and carrying out other instructions in your Will. Appoint people you trust to comply with your wishes. Even if a spouse or partner is chosen as a sole Executor, others may be appointed as reserve executors. Executors are also appointed as 'Trustees' which may involve long term management e.g. looking after money for minor children. A maximum of 4 Executors are allowed to administer an Estate when a Will has to be proved. An Executor CAN also be a beneficiary.

Do you wish your Spouse/Partner to be an Executor? YES / NO / NA

If 'YES', sole Executor or Jointly with Executors listed below? SOLE / JOINTLY

Reserve Executor? (in case appointed executor is unable or unwilling) YES / NO

(i) Executor Surname (Mr / Mrs / Miss / Ms)

Forenames _____ Surname _____

Address

—

_____ Telephone No:

Relationship: (First Testator) _____ (Spouse / Partner) _____

(ii) Executor Surname (Mr /Mrs / Miss / Ms)

Forenames _____ Surname _____

Address

—

_____ Telephone No:

Relationship: (First Testator) _____ (Spouse / Partner) _____

(iii) Executor Surname (Mr /Mrs / Miss / Ms)

Forenames _____ Surname _____

Address

—

_____ Telephone No:

Relationship: (First Testator) _____ (Spouse / Partner) _____

(iv) Executor Surname (Mr /Mrs / Miss / Ms)

Forenames _____ Surname _____

Address

—

_____ Telephone No:

Relationship: (First Testator) _____ (Spouse / Partner) _____

Charges and Fees.

Executors may also be beneficiaries but they cannot charge for their work unless they have accepted the appointment in a professional capacity e.g. As an Accountant or Solicitor. Will any of the appointed Executors be acting in a professional capacity (e.g. accountants, banks, solicitors)? YES / NO

(3) Guardians

Appoint people who will look after minor children (under 18) after the death of both partners. Choose people who will be acceptable to both sides of the family.

(i) (Mr /Mrs / Miss / Ms)

Guardian Surname _____

Forenames _____

Address: _____

—

Telephone No: _____

Relationship: (First Testator) _____ (Spouse / Partner)

(ii) (Mr /Mrs / Miss / Ms)

Guardian Surname_____

Forenames_____

Address:_____

—

Telephone No: _____

Relationship: (First Testator) _____ (Spouse / Partner)

(4) Legacies

(a) Specific Items

Identify items as clearly as possible e.g. 'My 1972 gold Rolex watch'. If you wish to give a general possession which may be regularly changed, write something like 'Any motor car owned by me at the time of my death'.

From First Testator

From Spouse / Partner

Recipient (1)

To: (Mr/Mrs/Miss/Ms)
Surname: _____

(Mr / Mrs / Miss / Ms)

Forenames: _____

Relationship: _____

Details of gift: _____

Give only after second death? YES/NO

Give only after second death? YES/NO

From First Testator

From Spouse / Partner

Recipient (2)

To: (Mr/Mrs/Miss/Ms)
Surname: _____

(Mr / Mrs / Miss / Ms)

Forenames: _____

Relationship: _____

Details of gift: _____

Give only after second death? YES/NO

Give only after second death? YES/NO

(b) Gifts of Money

These gifts are usually paid free of tax calculations. i.e. Inheritance Tax is paid from the Residuary Estate and the recipient is paid the whole amount shown. Use this section to gift the contents of bank accounts, stocks, shares or any part of your Estate that may be subject to tax calculations.

Recipient (1)

To: (Mr/Mrs/Miss/Ms)
Surname: _____

(Mr / Mrs / Miss / Ms)

Forenames: _____

Relationship: _____

Details of gift: _____

Give only after second death? YES/NO

Give only after second death? YES/NO

Tax Free? YES / NO At Age? _____ Yrs

Tax Free? YES / NO At Age? _____ Yrs

Recipient (2)

To: (Mr/Mrs/Miss/Ms) (Mr / Mrs / Miss / Ms)
Surname: _____

Forenames: _____

Relationship: _____

Details of gift: _____

Give only after second death? YES/NO Give only after second death? YES/NO

Tax Free? YES / NO At Age? ____Yrs Tax Free? YES / NO At Age? ____Yrs

(c) Goods and Chattels

Personal possessions (house contents etc.) given separately from the Residue.

To: (Mr/Mrs/Miss/Ms)
Surname _____ Forenames _____
Relationship _____

(5) Residue

Main Beneficiaries

The 'Residue' is everything left in your Estate after debts and any legacies have been paid. You can leave everything to your spouse or partner but if they do not survive you by 30 days your Estate can pass to your children (or grandchildren) or to other named beneficiaries.

Residue of Estate to pass firstly to spouse / partner? YES / NO / NA

And/or then to pass onto children and grandchildren (including those not yet born)?

YES (Children may be listed) Go to (i)
NO (Estate to pass to named beneficiaries) Go to (ii)
No further beneficiaries Go to section 6

(i) Children as beneficiaries:

If you have a young family leave the 'Child name' boxes blank - this will allow for further children being born without having to amend your Will. If the children in your family have come from more than one partnership it is best to name them (with relationships like 'step-son') to indicate exactly who is included.

Write FULL NAMES of children and their PRESENT SURNAMES.

	Relationship to:	
	Testator	Spouse
Child name (1) _____ _____	_____	_____
Child name (2) _____ _____	_____	_____
Child name (3) _____ _____	_____	_____
Child name (4) _____ _____	_____	_____

Are all children over the age of 18 years? YES / NO

(ii) Named Beneficiaries:

If you are single, do not have children or wish your Estate to pass to other friends / relations, ignore the children section and use the Named Beneficiary section instead. The share they are to receive can be written as a percentage (e.g. 35%) or as a fraction (e.g. $\frac{1}{4}$). If the share box is left blank, they will receive equal shares of your Estate. Charities may be named in this section.

	Relationship to:		
	Share	Testator	Spouse
Beneficiary name (1) _____	_____	_____	_____
Beneficiary name (2) _____	_____	_____	_____
Beneficiary name (3) _____	_____	_____	_____
Beneficiary name (4) _____	_____	_____	_____

(iii) Reserve beneficiaries if distributions above fail entirely:

In case all your previous beneficiaries fail to survive you, Reserve Beneficiaries can be named. Charities may be named as well as people in this section.

	Relationship to:		
	Share	Testator	Spouse
Reserve Beneficiary name (1) _____	_____	_____	_____
Reserve			

Beneficiary name (2) _____

(6) Other Information

Exclusions:

Have you deliberately excluded anyone who may have a possible claim on your Estate?
Name people who may claim they have been excluded as an oversight. Indicate if exclusion is mutually agreed.

First Testator: YES / NO

Spouse / Partner: YES / NO

Name Excluded: _____

Name Excluded: _____

Mutually agreed? (1st Testator) YES / NO

(Spouse / Partner) YES / NO

Business:

Do you have any business interests which may form part of your Estate?
Sole Traders and Partnerships which may be continued by beneficiaries. Shares in a Limited Company should be given as Legacies.

First Testator:_____ Spouse / Partner:_____

Medical Donation:

Do you wish your organs to be used for transplant purposes?

An expression of a wish to reinforce the intentions declared by carrying a Donor Card.

First Testator: YES / NO Spouse / Partner: YES / NO

Organs to be donated: All / Kidneys / Corneas /Heart Lungs / Other_____ All / Kidneys / Corneas / Heart Lungs / Other_____

Funeral Requests:

Do you wish to specify funeral arrangements?
Requests can be recorded in your Will but friends, relations and executors should also be informed separately.

First Testator: NONE / BURIAL / CREMATION

Spouse / Partner: NONE / BURIAL / CREMATION

First Testator: Spouse / Partner:

Church/Crematorium:_____ Church/Crematorium_____
Village/Town:_____ Village/Town: _____
Parish/County:_____ Parish/County:_____

Funeral Expenses paid by:

RELATIVES / PREPAYMENT PLAN

RELATIVES / PREPAYMENT PLAN

(7) Trustee Powers

Your Executors (who also act as Trustees) need to be given additional powers to carry out your instructions as you would wish. Standard Trustee Powers are included in all Wills unless alternatives are specifically requested. Stated powers that do not apply to your Estate at present can be included as safeguards to allow for a future change in circumstances.

Executors and Trustees have power to:

Invest money appropriately

Advance money to minor children

Pay fees to professionals

Substitute gifts by agreement with beneficiaries

Treat all income to the Estate as being earned after death

Insure property in the normal way

Have funds not taxed disadvantageously as trusts

Pass the Estate to the next beneficiary if any do not survive the testator by 30 days

Declaration to be signed by Testator(s)

I/ We confirm that I/we am/are over the age of 18 years and am/are of sound mind. The information given on this form is complete and correct and is to be used as the basis of preparing my/our Last Will and Testament. In addition to appointments, legacies and distribution of Residue I/we agree to my/our Executors and Trustees having normal Powers to aid the administration of my/our Estate(s). I/We know of no other Trusts or constraints which would prevent my/our Estates being distributed as I/we have requested.

Dated:_____

Signed
First Testator: _____

Signed
Spouse/Partner:_____

Confirmation

I/We have read and had explained the Last Will and Testament(s) prepared for me/us from my/our instructions above (including any supplementary pages) and confirm this/they express(es) my/our wishes.

Dated:_____

Signed
First Testator: _____

Signed
Spouse/Partner:_____

Method of Payment: Cheques made payable to “Abbey Broadway” or
Bacs : A/c Name: Abbey Broadway..Sort Code ; 05-06-56 ..A/c No: 31178043(Ref:Your Name)

Send completed application form and payment to :

**ABBEY BROADWAY
7 Waters Edge
Ashton Under Lyne
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