

Checklist for preparation of a will

Before we begin drafting your will, it is helpful if you can provide us with certain information. The following list is a general guide as to the sort of details we need from you.

You

Full name, date of birth, full address and telephone number.

Partner

Full name and date of birth of your wife/husband or civil partner. Also a wife's maiden name.

Marriage

Date and place of marriage or civil partnership. Details of any previous marriages, including children of a previous marriage. Copy of marriage certificate/civil partnership certificate (to be kept with the wills for production to HMRC if necessary).

Children

Full names of all children, their dates of birth and current addresses (if different from yours).

Guardians for children

Full names and addresses of guardians to be appointed to look after minor children.

Executors

Full names and addresses of executors to deal with the winding up of your estate and who will become trustees if applicable. We normally suggest that one is a close friend or relative and the other a professional person.

Gifts

Details of any specific gifts (including charitable gifts) you wish to make in your will. These should include names and addresses of the recipients.

The residue of your estate

An indication of how you wish the residue (ie the balance of the estate after gifts and liabilities are settled) to be distributed.

In the case of a married couple, the residue is usually left to each other. Thereafter, it is normally divided equally between children when they reach a specified age (minimum 18). We suggest the will provides that if any child dies under the specified age, themselves leaving children, then those children should inherit their late parent's share at a specified age.

Minors

Where there are minor children, the will should contain powers for executors to invest capital in anything they consider to be for the benefit of the children. It should also contain a power to advance capital to each child under the age at which they inherit. (The age must also be specified if it is to be greater than 18, the age of majority).

Pets

If you have animals or pets, we recommend that you leave detailed instructions for looking after them. Your will can include financial provision for them if you wish.

After death

If you choose, the will may set out your personal wishes on matters such as burial, cremation, organ donation and medical research.

Tax planning

Please also look at our fact sheet on inheritance tax planning.

Contact

Please contact the head of our wills, probate and trusts team.

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