

SKB Law will use the information you provide in this form to draft your Will, or two 'mirror' Wills for a couple. It will also reveal whether special arrangements are advisable to meet your needs. Please write clearly and answer all the questions. Please use a separate sheet of paper if you require additional space.

Section One: Personal Information

Full Name: _____

Address: _____

Date of Birth: _____

Email: _____

Contact #: _____

Do you have any health issues or mental impairments which may affect your capacity to make a Will? Yes No

Do you have an existing Will? Yes No

Marital Status: Single Married Separated Divorced Widowed

if married:

Name of Spouse: _____

Would You Like a Mirror Will for your Spouse? Yes No

(Mirror Wills are actually two Wills, usually created by spouses or partners, that names each other as the main beneficiary)

Children: please provide details of any children (we can include a provision for any that you may have in the future, unless you advise us this is not appropriate)

Name: _____ Date of Birth: _____

Address: _____

Name: _____ Date of Birth: _____

Address: _____

Name: _____ Date of Birth: _____

Address: _____

Signature and printed name

Date

Section Two: Appointment of Executor(s)

When you make a Will, you need to choose your executor(s). An executor is someone named in a Will as responsible for sorting out the estate of the person who's died. Your estate is everything you own, including money, property and possessions. Your executor will be responsible for collecting the assets of your estate, paying debts, funeral expenses and taxes, and distributing the balance in accordance with your instructions. They will also become trustees of any parts of the estate retained for beneficiaries who are under age. Anyone aged 18 or above can be an executor. Your spouse or partner may be an executor. It's a good idea to choose at least two executors, so they can share the responsibility and in case one of them dies before you. You can appoint up to four executors. It is recommended that you seek their agreement before appointing them. The people you choose can also inherit something from your Will.

Executor One

Full Name: _____

Address: _____

Relationship: _____

Executor Two

Full Name: _____

Address: _____

Relationship: _____

Section Three: Appointment of Guardian(s)

If you have a child or children under 18, it is important to appoint a guardian(s) to look after them in case you and the other parent should die while they are still under age. You can appoint more than one person. It is recommended that you discuss this with the other parent and seek the guardian's agreement before appointing them. Your Will ensures that money from your estate is available to the guardian to help care for your children.

Guardian One

Full Name: _____

Address: _____

Relationship: _____

Guardian Two (optional)

Full Name: _____

Address: _____

Relationship: _____

Signature and printed name

Date

Section Four: About Your Estate

The value of your estate will be your assets minus your liabilities. Please list your current approximate sole assets or your share of jointly owned assets and approximate values for each item. The inheritance tax threshold is £325,000. If you have inheritance tax liability we recommend you seek further advice. Please use a separate sheet of paper if you require additional space.

Your Assets

	Ownership (joint / sole)	Value
Properties		
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
Car(s)		
1 _____	_____	_____
2 _____	_____	_____
Cash in the bank		
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
Jewellery		
1 _____	_____	_____
2 _____	_____	_____
Pension(s) / Bonds / ISAs / Work-Based Schemes (inc. death in service)		
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
Other Items / Overseas Assets		
1 _____	_____	_____
2 _____	_____	_____

Your Liabilities (debts)

Please list all of your liabilities and approximate value e.g. mortgage, bank loans, credit cards, car loan, other debts.

1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____
4 _____	_____	_____
2 _____	_____	_____

Signature and printed name

Date

Section Five: Distribution of your Estate (Beneficiaries)

Beneficiaries are the people who will receive something in your Will. If you are leaving everything to one person, it is advisable to provide details of a substitute just in case.

Specific Gifts: these are gifts of specific amounts or objects that you wish to make to a particular person. They will not pass with the balance of your estate.

Beneficiary Name: _____ Relationship: _____

Address: _____

Details of Gift: _____

Beneficiary Name: _____ Relationship: _____

Address: _____

Details of Gift: _____

Beneficiary Name: _____ Relationship: _____

Address: _____

Details of Gift: _____

Beneficiary Name: _____ Relationship: _____

Address: _____

Details of Gift: _____



Residuary Estate (basically everything else). You must now consider who will receive the 'residue' of your estate, which is what remains after your debts, taxes and any gifts listed have been taken out. You can choose your spouse/partner/civil partner, your children, a charity or somebody else.

Full Name: _____ Relationship: _____

Address: _____

- Do you wish your children to receive equal shares of your estate? Yes No
 - If you do not wish them to receive equal shares, please state the % share you wish each to receive.
- Do you want to make provision for future children? Yes No

Signature and printed name

Date

Section Six: Your Funeral Wishes

You should include your wishes for your funeral arrangements and remains. The type of information you may wish to record can include:

- Burial or Cremation
- Location of Service
- Service style: religious, environmentally friendly, readings

Thank you for sharing your instructions. Our legal team is available to answer any questions or support you with any section of this form. Please call SKB Law on 01274 727373 or email info@skblawfirm.co.uk

Signature and printed name

Date