



SPOFFORTHS

WILL WRITING SERVICE

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SPOFFORTHS WILL WRITING SERVICE

Thank you for expressing an interest in the Spofforths Will Writing Service.

Making or up-dating a Will is one of the most important steps all our clients are encouraged to take. We aim to make the process as straight-forward and easy to follow as possible.

We take great pride in the service that we provide and we look forward to helping you to complete your Will.

Your next step is to complete and return this form to us by post or, if you prefer, please bring it along to your Will meeting.

If you would like any help completing this form please contact us at:

Spofforths Private Client Services LLP

Springfield House
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Tel 01403 253 282

E-mail philiplansberry@spofforths.co.uk / kaileilee@spofforths.co.uk

We are here to help you and would be pleased to answer any queries you may have or to offer guidance.

Personal Details

So that we can ensure that your Will gives full expression to your wishes and that no unnecessary tax liability will arise, please answer the questions relevant to you.

In some cases it may be desirable to supplement your replies by a discussion before your Will is drafted. If you would prefer not to answer this questionnaire at all, and to come and see us instead, you are more than welcome to do so.

Please tick one box to indicate the service you require

Single Will

Mirror Wills for you and your spouse/partner

	You		Your Spouse/Partner
Title (Mr/Mrs/Miss etc):		Title (Mr/Mrs/Miss etc):	
Forename:		Forename:	
Middle name/s:		Middle name/s:	
Surname:		Surname:	
Full Address:		Full Address:	
	Postcode:		Postcode:
Tel No (Home):		Tel No (Home):	
(Work/Mobile):		(Work/Mobile):	
E-mail:		E-mail:	
Date of Birth:		Date of Birth:	
Current Marital Status: (please tick appropriate box)	Single		Single
	Separated		Separated
	Widowed		Widowed
	Married/Civil Partnership *		Married/Civil Partnership *
	Divorced		Divorced
	Co-habiting		Co-habiting
Previous Marital Status:	If you have ever been widowed, please tick the box		

*** All references to marriage, spouse, divorce, widow etc refer to Civil Partnerships as well as marriage.**

Responsibilities

You are free to leave your estate to anyone you choose, but please be aware that the law does confer rights on people who have been wholly or partly maintained by you or those to whom you have made a binding promise to leave them something. If you do not provide for someone that is financially dependent on you at the date of your death then he/she may be able to make a claim against your estate. This can apply to your spouse or other relative and also to children whether they are your own or those of your spouse/civil partner whom you have treated as your own. It is up to the Courts to decide the validity of any claims but we can advise you if needs be.

	You		Your Spouse/Partner	
	Yes	No	Yes	No
<i>Please tick</i>				
Are you paying maintenance for a child?				
Are you paying maintenance to a spouse by a previous marriage?				
Are you maintaining or responsible for a parent or someone else?				
Is any member of your family disabled or financially vulnerable or have any other special problems or needs?				
Have you signed a pre-nuptial or co-habitation agreement?				
Have you signed a Power of Attorney of any kind, e.g. Ordinary, Enduring or Lasting?				

If you have answered "yes" to any of the above questions, please provide brief details below.

Inheritance Tax

If you are domiciled in the UK, inheritance tax is the tax payable on your estate when you die and on certain lifetime gifts. Wills can be written to reduce your potential liability to inheritance tax. If you want to know more about inheritance tax and how it might affect you, please refer to our website for general information. For advice and guidance on your personal inheritance tax position, please refer to your Spofforths Private Client Services adviser. Remember, anything you leave to a surviving spouse, civil partner or a charity will be exempt from inheritance tax.

	You		Your Spouse/Partner	
	Yes	No	Yes	No
<i>Please tick</i>				
Is the total value of all you own, less all you owe, more than £325,000?				
If you are widowed, did you inherit everything under your late spouse's Will?	Yes		No	
Do you own an interest in a family business, partnership or agricultural property of any nature?				
Are you non-UK domiciled or do you own any assets outside the UK, especially land?				
Have you made a foreign Will?				
Are you a beneficiary of a Trust or have you ever set up a Trust?				

If you reply "yes" to any of these questions, please complete our Estate Planning Questionnaire at the end of this form. By completing this additional short questionnaire we will be able to calculate the amount of Inheritance Tax due on your estate. If you wish, we will also be in a position to advise you on how you might reduce your inheritance tax bill by making a tax saving Will.

Marriage

A marriage or remarriage revokes (cancels) any Will made beforehand unless a Will is specifically drafted to avoid being revoked by marriage. On the other hand, divorce treats a former spouse/partner as if he or she had predeceased you so that the appointment of a former spouse/partner as executor would not take effect and a gift to a former spouse/partner would lapse unless the Will is specifically drafted to avoid this from happening.

	<i>Please tick</i>	Yes	No
Do you plan to marry or enter into a civil partnership in the near future?			
If yes, do you wish your new Will to remain valid after you are married?			

If yes, please write in the full names of the person you intend to marry below

Future Changes

	<i>Please tick</i>	Yes	No
After one of you has died would you be happy for the survivor to be able to make a new Will changing the way your estate is shared out on their death?			

If you reply "no" to this question we will advise you on the various ways you can prevent this from happening.

Worldwide Will

Your Will covers all your worldwide assets unless you have foreign assets which pass according to the laws of the country in question or will pass under a foreign Will. If you wish your Will to exclude certain countries because you have an existing Will made in that country (or are going to make one), please state below the countries to be excluded.

Countries to be excluded	<i>Please tick</i>	You	Your Spouse/Partner

Previous Will

If you have made a Will before, where is this document kept?

House Deeds

Where are the title deeds to your property?

Information about your Children

Please give details of any children from your present relationship:

Full Name	Date of Birth

Please give details of any children from any previous marriage or relationship:

Full Name	Date of Birth	Children of You / Your Spouse/ Partner? Please indicate

Funeral Wishes

You only need to complete this section if you would like to include details of your intended funeral arrangements in your Will. Please note that funeral costs will automatically be treated as a debt of your estate and will be paid by your Executor from the monies in your estate unless you have a pre-paid funeral expenses plan.

Please indicate your preference:

	You		Your Spouse/Partner	
	<i>Please tick</i> Yes	No	Yes	No
I have a pre-paid funeral plan				
Cremation				
Burial				
Donate your organs for transplant				
Donate your body for medical research				

If you have any other specific funeral wishes, please insert details here:

Instructions concerning Pets

Please indicate your preference:

	<i>Please tick</i>	Yes
To be re-homed by a charity		
Give to a friend or relative to keep or re-home		
Your Executors are requested to re-home		

If you have answered "yes" to any of the above, please put further details here:

Executors & Trustees

Your Executors and Trustees administer your estate and any trusts created by your Will after your death and ensure that your wishes are carried out. This involves valuing your assets and liabilities at the date of your death, paying any Inheritance Tax due, obtaining a Grant of Probate, paying any debts and liabilities and distributing your remaining estate to the beneficiaries named in your Will.

Your Executors may need to hold money or property, as Trustees, for other people (usually children) until a trust comes to an end (usually when the children reach their age of entitlement).

Your Executors and Trustees should, therefore, be over 18 years and willing and able to act. An Executor can be a beneficiary under your Will. If you have infant children, your Executors will automatically become their Trustees.

Where appropriate, we recommend your spouse/partner act as your sole Executor if he/she survives you or after his/her death two other Executors. Spofforths would be pleased to act as one of your Executors if you wish. Our appointment can be very helpful to speed up what can be a very time-consuming job and to relieve stress. If you would like to know more about our Executor and Trustee Service please ask for our brochure.

If your spouse/partner survives you, please indicate below which of the following you wish to appoint as your Executor.

	<i>Please tick</i>	Yes
Your spouse/partner		
Spofforths		
Your spouse/partner and Spofforths jointly		
Your spouse/partner and the person or persons named below jointly		
Spofforths and the persons named below jointly		
The persons named below jointly		

Your spouse/partner's details *(if not already stated)*

Full name:		
Full Address:		
	Postcode:	
Relationship to you:	Spouse / Partner	

If you are single or your spouse/partner does not survive you, please indicate alternative Executors.

	<i>Please tick</i>	Yes
Spofforths		
Spofforths and the persons named below jointly		
The persons named below jointly		

Executor 1	
Forename:	
Middle name/s:	
Surname:	
Full Address:	
	Postcode:
Relationship to you: (if any)	

Executor 2	
Forename:	
Middle name/s:	
Surname:	
Full Address:	
	Postcode:
Relationship to you: (if any)	

Guardians

*If you have children under the age of 18 years, then your Will should appoint a guardian or guardians to look after them should both you and your spouse/partner die. **If a man is not married to the mother of his children then he will not automatically become their guardian on the mother's death.** The guardians are responsible for the welfare and upbringing of your children. We advise you to obtain confirmation from the guardians that they are willing to act. We will provide in your Will for your Executors to have power to make capital and/or income payments to your guardians to cover the costs of bringing up your children and for your children's general benefit. Should you appoint two guardians who do not live together, then it is advisable to express in writing where your children are to live. There is space below for you to appoint first choice guardians and then, if you wish, substitutional guardians.*

First Choice Guardian(s)

Guardian 1

Full name:		
Full Address:		
		Postcode:
Relationship to you: (if any)		

Guardian 2

Full name:		
Full Address:		
		Postcode:
Relationship to you: (if any)		

Replacement Guardian(s)

Guardian 1

Full name:		
Full Address:		
		Postcode:
Relationship to you: (if any)		

Guardian 2

Full name:		
Full Address:		
		Postcode:
Relationship to you: (if any)		

Legacies

Personal Effects

Specific gifts of personal effects can either be included in your Will or, more flexibly, incorporated in a separate note you leave with your Will. By leaving a separate note, you can change your mind and write a new note at any time to be placed with your Will without having to make a new Will. It is important to describe the items accurately to avoid confusion later on. A gift will not take effect if the intended recipient dies before you (unless you nominate substitute beneficiaries), instead the gift will form part of your residuary estate and be disposed of in accordance with your wishes (see "Residuary Estate").

	You		Your Spouse/Partner	
	Yes	No	Yes	No
Do you wish to leave such a note				

If yes, please let us have details here:

Legacy of Cash

Cash gifts can be made to individuals, charities or organisations. If you would like to make any cash gifts please complete the section below. As above, the gift will not take effect if the intended recipient dies before you. **If you have a spouse/partner, we will assume the legacies are to be paid after you and your spouse/partner have both died. If this is not the case, please tick the box as appropriate to indicate the contrary.**

Legacy 1

	You				Your Spouse/Partner		
Amount:	£			Amount:	£		
Forename:				Forename:			
Middle name/s:				Middle name/s:			
Surname:				Surname:			
Age:				Age:			
Address:				Address:			
	Postcode:				Postcode:		
Relationship to you: (if any)				Relationship to you: (if any)			
	<i>Please tick</i>	Yes	No		Yes	No	
To be paid after my death even if my spouse/partner survives me.				To be paid after my death even if my spouse/partner survives me.			

Legacy 2

	You				Your Spouse/Partner		
Amount:	£			Amount:	£		
Forename:				Forename:			
Middle name/s:				Middle name/s:			
Surname:				Surname:			
Age:				Age:			
Address:				Address:			
	Postcode:				Postcode:		
Relationship to you: (if any)				Relationship to you: (if any)			
	<i>Please tick</i>	Yes	No		Yes	No	
To be paid after my death even if my spouse/partner survives me.				To be paid after my death even if my spouse/partner survives me.			

Legacy 3					
		You		Your Spouse/Partner	
Amount:	£	Amount:	£		
Forename:		Forename:			
Middle name/s:		Middle name/s:			
Surname:		Surname:			
Age:		Age:			
Address:		Address:			
	Postcode:		Postcode:		
Relationship to you: (if any)		Relationship to you: (if any)			
	<i>Please tick</i>	Yes	No	Yes	No
To be paid after my death even if my spouse/partner survives me.					

Legacy 4					
		You		Your Spouse/Partner	
Amount:	£	Amount:	£		
Forename:		Forename:			
Middle name/s:		Middle name/s:			
Surname:		Surname:			
Age:		Age:			
Address:		Address:			
	Postcode:		Postcode:		
Relationship to you: (if any)		Relationship to you: (if any)			
	<i>Please tick</i>	Yes	No	Yes	No
To be paid after my death even if my spouse/partner survives me.					

Please continue on separate sheet if needs be.

Residuary Estate

Your residuary estate is what is left after the payment of debts, funeral expenses (unless pre-paid) and any taxes and legacies.

If you would like to discuss with our estate planning experts the writing of a Will to minimise Inheritance Tax please let us know. A very considerable amount of tax can be saved if a Will is specially prepared with tax saving in mind.

We recommend that you specify reserve beneficiaries in the event that all the named beneficiaries of the residue of your estate die before you. If not, your estate could pass under the laws of intestacy.

Gift to Spouse/Partner

	<i>Please tick</i>	Yes	No	N/A
Do you wish your residuary estate to pass to your spouse/partner?				
If 'yes' are you happy for them to do as they please with their inheritance, e.g. spend it all, give it away or change their Will after you have died, so it passes differently to the way you would like it left?				
<i>If 'no' please ask for our advice on the options open to you to ensure your wishes are upheld and not changed after your death</i>				

Gift to Children/Grandchildren

Please complete this section if you have children/grandchildren. If not, proceed to "Calamity Clause" on the next page.

	<i>Please tick</i>	Yes	No
If you are single or your spouse/partner does not survive you, do you wish your residuary estate to pass to your children/step-children in equal shares?			
Are your children/step-children already old enough to have their inheritance paid straight to them?			
If one of your children/step-children should predecease you, do you wish his/her share to pass to his/her children, i.e. your grandchildren?			

At what age would you like your children/step-children or grandchildren to inherit

<i>Please tick</i>			<i>Please tick</i>		
Age for children	18		Age for grandchildren	18	
	21			21	
	23			23	
	25			25	
	Other			Other	

Calamity Clause

If none of the above applies to you or if everyone passes away at the same time or before you then we recommend you name reserve beneficiaries. You could leave everything to one person/charity or share your estate between many beneficiaries. If more than one beneficiary is involved, we suggest you divide your estate according to fixed percentages.

Please tick **Yes** **No**

Do you want to leave your estate to one person or to one charity? If so, insert their details below:

One Person

Forename:

Middle name/s:

Surname:

Age:

Address:

Postcode:

Relationship to you: (if any)

Please tick **Yes** **No**

If this person dies before you, do you want his/her children to inherit his/her entitlement?

One Charity

Name:

Address:

Postcode:

Registered Charity Number:

If you wish to leave your estate to more than one person, you have two options. Please read both options to see which version suits you best.

Option 1

You wish to divide your estate between a number of different people and/or charities and in this case please complete the following section of this form. Please continue on a separate sheet if necessary.

Beneficiary 1

Proportion of residuary estate: _____ %

Full name/name of charity: _____

Age: _____

Address: _____

Postcode: _____

Relationship to you: (if any) _____

Please tick **Yes** **No**

If Beneficiary 1 dies before you, do you want his/her children to inherit his/her entitlement?

Beneficiary 2

Proportion of residuary estate: _____ %

Full name/name of charity: _____

Age: _____

Address: _____

Postcode: _____

Relationship to you: (if any) _____

Please tick **Yes** **No**

If Beneficiary 2 dies before you, do you want his/her children to inherit his/her entitlement?

Beneficiary 3

Proportion of residuary estate: _____ %

Full name/name of charity: _____

Age: _____

Address: _____

Postcode: _____

Relationship to you: (if any) _____

Please tick **Yes** **No**

If Beneficiary 3 dies before you, do you want his/her children to inherit his/her entitlement?

Option 2

You wish to leave your estate to groups of beneficiaries, e.g. 50% to my spouse's family and 50% to my family or perhaps 90% to my nephews and nieces and 10% to charities. If this is how you wish to leave your estate please complete the following section of this form.

Group 1**Proportion of residuary estate:**

%

Please insert details of every member of the group below. Please continue on a separate sheet if necessary.

Full name/name of charity:**Age:****Address:****Postcode:****Relationship to you: (if any)****Full name/name of charity:****Age:****Address:****Postcode:****Relationship to you: (if any)****Full name/name of charity:****Age:****Address:****Postcode:****Relationship to you: (if any)****Full name/name of charity:****Age:****Address:****Postcode:****Relationship to you: (if any)**

Group 2

Proportion of residuary estate: %

Please insert details of every member of the group below. Please continue on a separate sheet if necessary.

Full name/name of charity:	
Age:	
Address:	
	Postcode:
Relationship to you: (if any)	

Full name/name of charity:	
Age:	
Address:	
	Postcode:
Relationship to you: (if any)	

Full name/name of charity:	
Age:	
Address:	
	Postcode:
Relationship to you: (if any)	

Full name/name of charity:	
Age:	
Address:	
	Postcode:
Relationship to you: (if any)	

Group 3

Proportion of residuary estate: %

Please insert details of every member of the group below. Please continue on a separate sheet if necessary.

Full name/name of charity:

Age:

Address:

Postcode:

Relationship to you: (if any)

Full name/name of charity:

Age:

Address:

Postcode:

Relationship to you: (if any)

Full name/name of charity:

Age:

Address:

Postcode:

Relationship to you: (if any)

Full name/name of charity:

Age:

Address:

Postcode:

Relationship to you: (if any)

Other General Information

Please insert in the space below any other information you feel it may be useful for us to know when drafting your Will.

ESTATE PLANNING QUESTIONNAIRE

At Spofforths we have considerable experience of advising our clients about estate planning and on the preservation of their wealth. Now, more than ever, this involves taking steps to minimise the impact of Inheritance Tax and Capital Gains Tax.

Our Specialist Team have developed a comprehensive range of tax saving techniques, many of which involve the use of specially drafted Wills and Trusts.

To enable us to advise you on the full range of estate planning opportunities, please complete this short questionnaire (approximate values only are required – **please insert values to nearest £1,000**).

Assets	You	Your Spouse/Partner	Joint
Main residence	£	£	£
Other residential or commercial property	£	£	£
Farmland	£	£	£
Business assets	£	£	£
Building society/Bank accounts	£	£	£
Investments/Bonds	£	£	£
PEPs/ISAs etc	£	£	£
National Savings	£	£	£
Life assurance	£	£	£
Mortgage Protection policy	£	£	£
Foreign assets	£	£	£
Other assets	£	£	£
Total Assets	£	£	£

Liabilities	You	Your Spouse/Partner	Joint
Mortgage	£	£	£
Loans	£	£	£
Other liabilities (e.g. credit cards)	£	£	£
Total Liabilities	£	£	£

Total Net Estate (i.e. Total Assets less Total Liabilities)	£	£	£
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Death in service benefits	£	£	£
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Value of pension funds	£	£	£
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Gifts in last 7 years over £3,000 p.a.	£	£	£
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