

# WILL WRITING INSTRUCTION FORM

## WILL INSTRUCTIONS

To commence the will writing process you must now complete your personal information and detail how your estate should be distributed on your death. If you are unsure which will is the most suitable for you please call 01908 577680.

**Please complete this form using black ink.**

**Please specify whether these instructions relate to a:**

Single will       Mirror will       Discretionary Trust and Mirror will

NB reference to civil partnerships in these instructions apply to civil partnerships registered on or after 5 December 2005.

## PERSONAL DETAILS

Title (Mr/Mrs/Ms/Miss/Other)

Surname

Full Forenames

Date of Birth

Town and Country of Birth

Full Postal Address

Home Tel No.

Daytime Tel No.

Email Address

## SPOUSE/PARTNER'S DETAILS

Title (Mr/Mrs/Ms/Miss/Other)

Surname

Full Forenames

Date of Birth

Town and Country of Birth

Full Postal Address

Home Tel No.

Daytime Tel No.

Email Address

Do you consider yourself to be permanently resident in England or Wales?      Yes       No

Do you consider yourself to be permanently resident in Scotland?      Yes       No

Do you consider yourself to be permanently resident in Northern Ireland?      Yes       No

If you consider yourself to be permanently resident elsewhere, please state which country

Are you married/or intending to be married in the near future?      Yes       No

Are you entering into or are you already in a registered civil partnership?      Yes       No

## YOUR ESTATE

Assets	You	Spouse/Partner/ Civil Partner	Jointly Owned
Property assets	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Remainder of assets	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Liabilities	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

## JOINT ASSETS (NOT WITH SPOUSE/PARTNER/CIVIL PARTNER)

Do you have any UK assets owned jointly, with another person or organisation, who is not your spouse/partner/civil partner?

Yes  No

If 'Yes', please give the following details:

Name(s) of joint owner(s)	Total value of asset(s)	Share which you own
<input type="text"/>	£ <input type="text"/>	<input type="text"/> %

Details of asset(s)

## FOREIGN ASSETS

Do you have any assets outside the United Kingdom?

Yes  No

If 'Yes', please give the following details: (ie what the asset is, country held in and its approximate value)

Have you made a will in the particular country or countries?

Yes  No

## EXISTING TRUSTS

Are you a beneficiary under a current trust? If 'Yes', please give details:

Yes  No

## DETAILS OF CHILDREN/STEPCHILDREN/GRANDCHILDREN

Number of children	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>
Number of stepchildren	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>
Number of grandchildren	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>



## EXECUTORS

Please indicate who you wish to appoint as executors. If you are considering appointing MK Legal Solicitors please refer to the Estate Administration Guide (copies are available from your local branch).

MK Legal Solicitors jointly with spouse/partner/civil partner

Your spouse/partner/civil partner or if they are unable to act, MK Legal Solicitors

MK Legal Solicitors sole

Other (please indicate)

Name  
Address

## FUNERAL INSTRUCTIONS

Do you wish your body to be:

Buried  Cremated  No preference

Does your spouse/partner wish their body to be:

Buried  Cremated  No preference

If you have any special instructions, we suggest you detail these in a separate note which is kept with your will.

## GUARDIANS

If you have any children who are under 18 years of age you may appoint Guardians to look after them in the event of your death (and your spouse/partner/civil partner). **Please place contact details in the box below.**

Name

Address

## GIFTS

Many people wish to make gifts of money or special items, these are known as "legacies".

You should now consider any gifts you wish to make, **please write details in the box below and attach an additional sheet if required.**

Gift	Name	Address	Relationship to you

## THE RESIDUE OF YOUR ESTATE

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

We have identified the three most common ways of dealing with the residue of an estate. Read them carefully and choose **one** which best suits you. If you are in doubt, let us know and we will advise you.

Select one only:

I wish to leave all the "residue" of my estate to my partner, but if he/she dies before me, to the people named overleaf.

I wish to leave all the "residue" of my estate to my partner, but if he/she dies before me, to the people named overleaf in the percentages indicated.

I wish to leave all the "residue" of my estate to the person(s) or organisations listed overleaf in the percentages indicated.



## DECLARATION

Please complete and sign the declaration and return the completed form in the pre-paid envelope provided.

Please prepare a will for me based on the instructions contained in this form.

This Instruction Form was completed by myself

or

### I understand that

- MK Legal Solicitors are regulated by the Solicitors Regulation Authority.
- The information requested in this form is required for the purpose of preparing my will and to ensure that the will reflects my wishes.
- The information is being used by MK Legal Solicitors responsible for preparing the will.
- I may be contacted to confirm my instructions.
- MK Legal Solicitors will charge for its services for acting as Executor after my death in accordance with its scale of fees applicable at that time.
- I certify that the information given in this form is true, complete and correctly represents my wishes.

### Please note:

- An additional charge may arise after your will has been prepared, should you make any alterations to your wishes that necessitates re-drafting your will. Therefore please check carefully that this form does reflect your wishes and nothing has been left out.
- MK Legal Solicitors reserve the right to make an additional charge if the nature of your instructions are such that time over and above what would be considered to be a reasonable time for preparing a will, is expanded in completing your will. You will be advised of the estimated additional charge before any work is undertaken.
- You have the right of access to your personal records held on MK Legal Solicitors files by written request to The Compliance Officer, MK Legal Solicitors, 14 Walker Avenue, Stratford Office Village, Wolverton Mill, Milton Keynes MK12 5TW.