



**PRIVATE AND CONFIDENTIAL**

Before we visit...

You might find it helpful to think about who you wish to benefit from your will and who you would like to appoint as your executors and guardians for any children.

**What items would you like to leave (known as specific bequests)?**

Gift	Who to (name)	Any comments

**What gifts of money would you like to leave (known as specific legacies)?**

Amount (£)	Who to (name)	Any comments

**Who would you like to benefit from the rest of your estate (known as the residue)? Please note this is best done by percentages of the value of the rest of your estate.**

Percentage (%)	Who to (name)	Any comments

**Who would you like to act as your executors (these are the people who will administer your estate):**

Name: Address:	Name: Address:
Name: Address:	Name: Address:

**Who would you like to act as guardians for any children under the age of 18?**

Name: Address:	Name: Address:
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**Finally, do you have any funeral wishes or any other specific points?**

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### Record of Assets and Liabilities

It might also be useful for you to identify what assets you have so that you can decide what you have to leave to your beneficiaries.

	<b>1<sup>st</sup> client:</b>	<b>2<sup>nd</sup> client:</b>	<b>Joint assets</b>
<b>Details of asset:</b>	Approx value (£)	Approx value (£)	Approx value (£)
<b>Land and property - 1<sup>st</sup></b>			
<b>Land and property-2<sup>nd</sup></b>			
<b>Furniture</b>			
<b>Personal effects</b>			
<b>Cars owned</b>			
<b>Bank accounts</b>			
<b>Building society accounts</b>			
<b>National Savings account</b>			
<b>Stocks &amp; shares</b>			
<b>Personal equity plans</b>			
<b>ISAs or TESSAs</b>			
<b>Life assurance</b>			
<b>Superannuation benefits</b>			
<b>Interest in other estates</b>			
<b>Interests in trusts</b>			
<b>Cash</b>			
<b>Business assets</b>			
<b>Other assets:</b>			
<b>TOTAL ASSETS:</b>			
<b>Details of liabilities:</b>	Approx value (£)	Approx value (£)	Approx value (£)
<b>Mortgage outstanding</b>			
<b>Credit card bills</b>			
<b>Loans</b>			
<b>Other monies owed</b>			
<b>TOTAL LIABILITIES:</b>			
	Approx value (£)	Approx value (£)	Approx value (£)
<b>VALUE OF ESTATE:</b>			
(This is assets minus liabilities)			

Please do not feel that you have to complete these forms as we will discuss these details with you during the initial visit.