

This form has been designed to gather information to help assess your needs and write your Will. **It is for indicative purposes only** and Irwin Mitchell may need to contact you for further details.

PRICE	SINGLE WILL	MIRROR WILLS
STANDARD WILL/CODICIL	£175.00	£260.00
ASSET PROTECTION WILL* See Section 5	N/A	£495.00
STANDARD AMENDMENT TO EXISTING WILL	£110.00	£140.00

Please ensure payment is supplied. If payment isn't supplied with this questionnaire then Irwin Mitchell will contact you on receipt to collect the fee. Please note this may cause a slight delay in processing your instructions'

GLOSSARY

SINGLE – Will for a single person

MIRROR – Wills for a couple whether married/civil partnership/living as partners

EXECUTOR – The person who will administer the distribution of your estate in accordance with the terms of your Will.

BENEFICIARY – The recipient(s) of your estate.

ESTATE – Everything you own such as houses, bank accounts, cars, house contents etc.

RESIDUE OF MY ESTATE – Your estate once all your debts/expenses (if any) have been cleared.

SINGLE WILL

MIRROR WILLS

SECTION 1

APPLICANT 1	APPLICANT 2
Title:	Title:
First & middle names:	First & middle names:
Surname:	Surname:
Address:	Address:
Postcode:	Postcode:
Daytime Telephone:	Daytime Telephone:
Email:	Email:
Date of Birth:	Date of Birth:
Marital Status:	Marital Status:
Male <input type="checkbox"/> Female <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>

SECTION 2

INITIAL QUESTIONS	YES	NO
• Do you own anything outside England, Wales, Scotland and Northern Ireland?	<input type="checkbox"/>	<input type="checkbox"/>
• Do you own a share in a business or partnership?	<input type="checkbox"/>	<input type="checkbox"/>
If yes please provide details: <input type="text"/>		
• Do you wish to leave anything to a person who has a disability or is reliant on means tested benefits?	<input type="checkbox"/>	<input type="checkbox"/>
• Is your estate in excess of £325,000 (if single, divorced or widowed), or £650,000 (if married /in a civil partnership)?	<input type="checkbox"/>	<input type="checkbox"/>

Approximate Estate Value

SECTION 3

NAMES OF YOUR CHILDREN OR OTHER BENEFICIARIES.	RELATIONSHIP TO APPLICANT 1	RELATIONSHIP TO APPLICANT 2	DATE OF BIRTH	PERCENTAGE TO RECEIVE

PLEASE CONTINUE ON A SEPARATE SHEET IF MORE THAN FOUR SPACES REQUIRED

Please give an **indication** of who you would like to appoint as the **Executors** and **Beneficiaries** of your estate. Irwin Mitchell will contact you to confirm and check your instructions.

Please refer to the enclosed brochure for details on Irwin Mitchell's Executorship service.

SECTION 4
EXECUTORS

- | | |
|--|--------------------------|
| 1. IRWIN MITCHELL ONLY | <input type="checkbox"/> |
| 2. IRWIN MITCHELL AND MY SPOUSE/PARTNER/CIVIL PARTNER/OTHER JOINTLY. If "other" selected please detail their name(s) below. | <input type="checkbox"/> |
| 3. MY SPOUSE/PARTNER/CIVIL PARTNER/OTHER WITH IRWIN MITCHELL AS A SUBSTITUTE SHOULD THEY BE UNABLE TO ACT FOR ANY REASON. If "other" selected please detail their name(s) below. | <input type="checkbox"/> |
| 4. OTHER – PLEASE SPECIFY BELOW. | <input type="checkbox"/> |

NAME OF EXECUTORS	RELATIONSHIP TO APPLICANT 1	RELATIONSHIP TO APPLICANT 2	DATE OF BIRTH

SECTION 5
OPTIONS FOR DISTRIBUTION OF ESTATE

OPTION 1
 I would like to leave the residue of my estate to my spouse/partner/civil partner, but if he/she dies before me then I wish my estate to pass to my children named in section 3. If any of my children pass away before me then the share they would have received will pass down to their children and so on all the way down the family tree.

OPTION 2
 I would like to leave the residue of my estate to my spouse/partner/civil partner, but if he/she dies before me, to the people named in section 3 in the percentages indicated.

OPTION 3
 I do not have a spouse/partner/civil partner so I would like to leave the residue of my estate to the person(s) / charity(ies) named in section 3 in the percentages indicated. If I leave everything to my children and if any of them pass away before me then the share they would have received will pass down to their children and so on all the way down the family tree.

* For an extra fee (indicated above) Irwin Mitchell can draft your Will(s) to include an Asset Protection Trust. This will allow your spouse/partner/civil partner to benefit from your share of jointly held property during their lifetime but following their death your share of the property will be distributed according to the terms of your Will. This can offer protection from future events such as your spouse/partner/civil partner remarrying/cohabiting/entering into a civil partnership with a new partner, or may assist with protecting your share of property from future care fees. If you initially wish for IM to prepare Asset Protection Wills for you please tick this box and ensure you provide the correct payment of the Asset Protection Will fee detailed overleaf

TERMS AND CONDITIONS

- The information requested in this form is to provide an indication of your wishes in relation to your Will. The information will be passed to IM who will contact you to collect payment for your Will, will clarify these instructions with you and take any additional instructions needed to complete your Will
- By answering these questions, and any subsequent questions raised by IM, you confirm you have completed this form yourself and you are not subject to coercion, undue influence, and have sufficient mental capacity to make a Will. If you are in doubt, please contact IM.
- Please note this instruction form must be completed by the client requesting the Will. If this hasn't been completed by the client then please provide a phone number which we can contact the client on. We cannot proceed without speaking to the client to confirm their instructions.

SIGNATURE		DATE
APPLICANT 1		
APPLICANT 2		