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Instructions for your Will

When you come to see us to discuss the terms of your will, it may be helpful if you have already thought about the following points.

1. Do you want to express any wishes regarding your funeral? You may wish to state whether you are to be cremated or buried. You may want to say where.
2. Do you want to leave any fixed sums of money to individual persons or to a church or charity? If so, are any of these to be paid in priority to the others?
3. Do you want to give any specific items of jewellery, furniture, pictures etc. to individual beneficiaries?
4. Who is to receive the remainder of your estate? If it is to be more than one person, we will want to know in what shares.
5. In the event of any person named to receive a legacy or part of the remainder of your estate dying before you, do you wish his or her children or spouse to take that share instead?
6. If children, now under age, are to be named as

beneficiaries, at what age are those children to inherit? You may feel age 18 is too young and that a later age such as 21 or 25 would be better. There may be Inheritance Tax implications of deferring the vesting age beyond 18+. You will no doubt wish to discuss these with us.

7. If you have infant children, do you want to state in your will who is to be appointed guardian of them? The implications of this will be discussed with you.
8. If applicable to your circumstances, who would you wish to inherit your estate in the event of a common accident resulting in the death of all your immediate family?
9. Who is to have the responsibility of collecting in the assets of your estate and dealing with them as instructed in your will? These persons are called executors and you can appoint up to four.

When the time comes to deal with your estate, to ensure there is no uncertainty about who is intended to benefit, it will be helpful if you have a note of the full names and addresses of all persons named in the will, and, if they are part of your close family, their relationship to you.