



Preparation form

Please complete as much of this form as you can and take it with you when you go to see your solicitor, who can talk you through next steps.

Please note if your husband/wife/partner is also making a will they should complete a separate preparation form.

Your details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:
	Marital status:

Your husband/wife/partners details	
First name:	Surname:
Home address: (if different)	Date of birth:
	Daytime tel no:
	Postcode:



Preparation form continued

Your child or children's details

Please include all your children from current or previous marriage or relationships.

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Your child's details	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:

Executors

You must appoint Executors to carry out the instructions in your will. It is advised to have at least 2 and you may appoint your spouse or partner as 1. You may wish to consider a professional Executor such as a Solicitor to act solely or jointly with another Executor.

First Executor	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:
Relationship to you:	

Second Executor	
First name:	Surname:
Home address:	Date of birth:
	Daytime tel no:
	Postcode:
Relationship to you:	

Preparation form continued

Your assets

Please indicate the approximate value of your assets; the sale value of your property, any savings, investments or insurances you have and the value of any jointly owned property.

[illegible]

Preparation form continued

Beneficiaries

Are there any specific sums of money you would like to make in your will? If so please give the full name(s) of the recipients with their full address and, if appropriate, their relationship to you.

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:

Preparation form continued

Beneficiaries

Are there any **specific items**, such as jewellery, you would like to gift in your will? If so please give the full name(s) of the recipients with their full address and, if appropriate, their relationship to you.

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:
Description of item:	

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:
Description of item:	

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:
Description of item:	

Beneficiary details	
First name:	Surname:
Home address:	Postcode:
	Amount £
	Relationship to you:
Description of item:	

Preparation form continued

Gifts to charities

We appreciate and respect that your family will always come first. Once you've taken care of them, you may wish to think about leaving a gift in your Will to Children's Hospice South West, or other causes you care about. **If you leave a gift to a charity in your will, its value will be deducted from your estate (your money, possessions and property) before Inheritance Tax is worked out.** You can also choose to leave a residue amount to a charity. If you wish to do this please complete the next section.

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Charity details

Charity name:

Address:

Postcode:

Amount £

Registered charity number:

Preparation form continued

Your remaining estate (residue)

The residue of your estate is any property or money remaining after the payment of specific legacies, gifts and expenses have been made. You cannot be sure how much the residue of your estate will be but it is wise to **name the individuals or charities you would wish the residue to pass to** and to indicate the proportion you would like them to receive.

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you:

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you:

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you:

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you:

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you:

Details

Full name:

Address:

Postcode:

Percentage of residue %

Relationship to you: