

Your Will only deals with assets that are in your sole name. If anything is held jointly with anyone else, those assets will normally pass automatically to the survivor. An exception to this is property held jointly as Tenants in Common. Your Will should, where applicable, cover all of your assets including property, money, pension lump sum, personal possessions, life policies, car, jewellery etc

It would be useful if you could bring the following information with you to your first appointment:

1. Your full name, address, telephone number and email address
2. ID for each person making a Will – we will need two forms including either a valid passport or driving licence AND a bank statement or utility bill showing your name and address which must be less than 3 months old.
3. Details of your family members including names, addresses and dates of birth
4. A list of your current assets and an approximate valuation of the same together with details of any charges currently secured against the assets

Your solicitor will discuss all matter relating to your Will with you at your first appointment but it may be useful if you have thought about the following beforehand:

1. Executors - These are the people who will deal with your estate on your behalf after you die and distribute the same according to your Will. It is best to have between 2 and 4 Executors. We will need their name and address.
2. Specific Legacies – These are specific items you would like to go to particular people. We would need a full description of the items and the name, address and relationship to you of the beneficiary.
3. Pecuniary Legacies – These are specific monetary amounts to particular people. Again, we need name, address and relationship to you of the beneficiary.
4. Beneficiaries - Name of person/people you would like your estate to pass to when you die and the proportions in which the estate will pass. Also, you may want to think about who the share will pass to if the first intended beneficiary has died before you. For example, if you were to leave the bulk of your estate to your spouse, you will need to think about who the total estate will pass to when the second one of you has died.
5. Age – If any of your intended beneficiaries are under 18, you will need to consider at what age you are happy for them to inherit and who you would trust to look after the money until they reach that age (known as ‘Trustees’)