

BREEZE & WYLES SOLICITORS LLP

Application Form for a Will

To enable us to prepare a will/wills for you please can you provide us with the information requested

Section 1 - Personal Details

	Details Required	You	Your Spouse/Partner
1.a	Name (in full)	Title: Mr/Mrs/Miss/Ms/Other Name	Title: Mr/Mrs/Miss/Ms/Other Name
1.b	Address	Postcode	
1.c	Date of Birth		
1.d	Telephone numbers	Home	Work
1.e	Marital status <i>mark as appropriate</i>	Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced .. <input type="checkbox"/> Partner <input type="checkbox"/>	Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced .. <input type="checkbox"/> Partner <input type="checkbox"/>
1.f	If married, date of		
1.g	Are you intending to exclude any relative that you support financially or any child, spouse or former spouse from Your estate?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
	If yes what is their relationship to you?		
1.h	Have you any current intention to marry/re- marry. If so, please provide brief details	No <input type="checkbox"/> Yes <input type="checkbox"/>	
1.i	Is your permanent home In England/Wales	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>
1.j	Please confirm that you can read and write and understand English?	No <input type="checkbox"/> Yes <input type="checkbox"/>	No <input type="checkbox"/> Yes <input type="checkbox"/>

Please complete in block capitals

Section 2 – Executors

Executors need to be appointed to take responsibility to ensure that the terms of your will are carried out. We always recommend appointing two executors because of the possibility of one not being available at your death and also because monies may need to be held on behalf of minor beneficiaries.

Despite the common misconception Executors can be beneficiaries – Your spouse/partner can be your Executor on their own or with additional Executors.

If you would prefer a professional Executor Breeze & Wyles Solicitors LLP would be happy to accept your appointment to act in such capacity.

2		Whom do you wish to appoint as Executor(s)?		You	Spouse/partner to choose too	Your spouse/Partner
2.1	My spouse/partner only. If he/she dies before me then the person named in the box <input type="checkbox"/>	Name	<input type="checkbox"/>	Name	Relationship	
2.2	My spouse/partner and the person named in the box <input type="checkbox"/>	Name	<input type="checkbox"/>	Name	Relationship	
or						
2.3	My spouse/partner and Breeze & Wyles Solicitors <input type="checkbox"/>		<input type="checkbox"/>			
Or						
2.4	Breeze & Wyles Solicitors only <input type="checkbox"/>		<input type="checkbox"/>			
Or						
2.3	The person(s) named in the box <input type="checkbox"/>	Name	<input type="checkbox"/>	Name	Relationship	

Please attach a separate sheet if you need to give us more details

Section 3 – Children

Details Required

3.1 Names/DOBS for all children of your present relationship

Name DOB		Name DOB
Name DOB		Name DOB

3.2 Names & DOBS for all children

You		Your spouse/Partner
Name DOB		Name DOB
Name DOB		Name DOB
Name DOB		Name DOB
Name DOB		Name DOB

If you have no children under 18 please move to Section 5 – otherwise continue with Section 4

Section 4 – Guardians

Legal Guardianship will pass automatically to a surviving parent provided they are married to each other
Legal Guardianship will usually pass automatically to a surviving un-married mother when a child's father dies

Legal Guardianship does not pass automatically to a surviving unmarried father when a child's mother dies
Legal Guardianship is not automatically passed to anyone if both parents die

4.1 Do you want to make a guardianship appointment?

You
Yes
No (go to Section 5)

Your spouse/Partner
Yes
No (go to Section 5)

4.2 Please supply name & address of guardian and identify which of the children they are to be guardians for

You
Guardian 1

Of these children

Guardian 2

of these children

Your spouse/Partner
Guardian 1

Of these children

Guardian 2

of these children

4.3 If you want to appoint substitute guardians please supply details

Guardian (substitute)

Guardian (substitute)

Please attach a separate sheet if you need to give us more details

Section 5 – Gifts of money and items

5.1 Do you want to make gifts of specific sums of money to any person/charity?

You

Yes
No (go to Section 5.3)

Your spouse/Partner

Yes
No (go to Section 5.3)

5.2 If yes please confirm names, addresses and amounts

£ to of

£ to of

5.3 Do you want to make gifts of specific items to any person/charity?

You

Yes
No (go to Section 6)

Your spouse/Partner

Yes
No (go to Section 6)

5.4 If yes please confirm names, addresses and items

Item to of

Item to of

If any of the people above die before you do you want their children to receive their gifts?

Yes
No

Yes
No

Anything you don't specify here will form your Residuary Estate

Section 6 – Distribution of your estate

<p>6.1 Do you want everything to pass to your spouse/partner in the first instance?</p>	<p style="text-align: center;">You</p> <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>No spouse/partner <input type="checkbox"/></p>	<p style="text-align: center;">Your spouse/partner</p> <p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>No spouse/partner <input type="checkbox"/></p>
<p>6.2 If your spouse/partner predeceases you, or 6.1 doesn't apply how do you want your estate distributed?</p>	<p>Divide between children <input type="checkbox"/></p> <p>Give to other(s) below <input type="checkbox"/></p> <p>Name Addresses</p>	<p>Divide between children <input type="checkbox"/></p> <p>Give to other(s) below <input type="checkbox"/></p> <p>Name Addresses</p>
<p>6.3 If any of the people above die before you do you want their children to receive their share(s) of your estate?</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
<p>6.4 If any beneficiaries are children at which age do you want the to inherit</p>	<p>18 <input type="checkbox"/></p> <p>25 <input type="checkbox"/></p>	<p>21 <input type="checkbox"/></p>
<p>6.5 Are any of the potential beneficiaries mentally or physically handicapped?</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>	<p>Name(s)</p>

Please attach a separate sheet if you need to give us more details

Section 7 – Funeral Wishes

7.1 Please indicate if you wish to provide for any of the below requests

You

Burial

Cremation

Body to medical research

Organs for Transplant

other

You spouse/Partner

Burial

Cremation

Body to medical research

Organs for Transplant

other

Section 8 – Confirmation of Instructions

8.1 Please confirm what you want us to prepare for you

One simple Will (£150.00 + VAT)

Two simple Wills (£250.00 + VAT)

Full Will and Estate Planning advice including Interview = Fee earner Hourly rate

8.2 We are obliged to check the identity of all clients. Please enclose the following

Signed Copy passport or
Signed Copy photo driving Licence
and
Copy utility bill

Signed Copy passport or
signed Copy photo driving Licence
and
Copy utility bill

8.3 Please enclose a cheque made Payable to '**Breeze and Wyles Solicitors LLP**' for;

Enclosed

Cheque for £176.25 OR Cheque for £293.75

8.4 Please sign to confirm your instructions

8.5 **Disclaimer** If we are instructed to prepare simple wills it means that we have not been asked to advise you on tax implications, foreign assets and implications of excluding beneficiaries or trust issues. If you need advice on any of these or other issues please contact us to make an appointment to discuss the same. The cost of such advice will be discussed with you at such appointment.

Return Address

Sarah Sardar

Breeze & Wyles Solicitors LLP,
Turners Hill Chambers, 1 Albury Grove Road,
Cheshunt, Hertfordshire, EN8 8XR

Breeze and Wyles Solicitors LLP