



Our **Will Writing** Service

Welcome to our Will writing service, for clients based in England and Wales. We're glad you've chosen us to make provisions for you and your family's future and look forward to assisting you in safeguarding your estate.

This form is the start of the Will writing process. It has been designed to gather initial information to help assess your needs. It is for assessment purposes only and we will need to contact you for further instructions, specific to your circumstances.

Please complete as much of this form as possible and return it to us at the address detailed on the reverse of this form.

Glossary

Single Will	For a single person
Mirror Wills	For a couple, whether married/civil partnerships/living as partners
Estate	Everything you own such as houses, bank accounts, cars, house contents, etc.
Executor	The person who'll deal with the administration of your estate in accordance with the terms of your Will
Beneficiary	The recipient(s) of your estate e.g. children, charities etc.
Residue of my estate	Your estate once all your debts/expenses (if any) have been cleared.

Section 1 - Type of Will

Please tick which option you require below.

Single Will

Mirror Wills (for couples)

Section 2 - Details

Applicant 1		Applicant 2	
Title:		Title:	
Surname:		Surname:	
Name/s:		Name/s:	
Address:		Address:	
Postcode:		Postcode:	
Daytime Telephone:		Daytime Telephone:	
Email:		Email:	
Date of Birth:	Gender: M / F	Date of Birth:	Gender: M / F
Marital Status:		Marital Status:	

Section 3 - Initial Questions

Do you own anything outside of England, Wales, Scotland and Northern Ireland?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you own a share in a business or partnership?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you wish to leave anything to a person who has a disability or is reliant on means tested benefits?	Yes <input type="checkbox"/>	No <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)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Section 4 - Beneficiaries e.g. Children/Charities/Other

Name of Beneficiaries e.g. Children/Charities/Other	Relationship to Applicant 1	Relationship to Applicant 2	Date of Birth	Percentage to Receive

Please continue on a separate sheet if more than three spaces are required.

Section 5 - Gifts of Money and Personal Items

Are there any causes that you're passionate about? Please add the name of the cause below if you wish to leave a gift in your Will. You're under no obligation to leave a gift by using this Will writing service.

Description of item or amount of cash gift	Name of intended beneficiary or charity

Section 6 - Executors

Please refer to the enclosed brochure for details of our Wills Assured package of services and further details of the Irwin Mitchell Executorship Service before selecting your option.

1. Irwin Mitchell only

2. Irwin Mitchell and my spouse/partner/civil partner/other jointly

3. My spouse/partner/civil partner/other with Irwin Mitchell as a substitute should they be unable to act for any reason

4. Other – please specify below

Names of Executors	Relationship to Applicant 1	Relationship to Applicant 2	Date of Birth

Please tick here if you wish to appoint a legal guardian for minors under the age of 18 (please provide the legal guardian names in the further comments box on the reverse of this form)

Section 7 - Options for Distribution of Estate

Option 1

I'd 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 4. 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 don't 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 4 in the percentages indicated. If I leave everything to my children or beneficiaries and if any of them pass away before me, then the share they would receive will pass down to their children and so on all the way down the family tree. **You may wish to consider leaving a share of the residue of your estate to a charity, however you are under no obligation to do so by using this Will writing service.**

Option 3

For an extra fee (as outlined in Section 9) we 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 own 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 Irwin Mitchell to prepare Asset Protection Trust Wills for you please tick this box and one of our team will contact you to discuss in more detail and advise you of the costs.

If these options aren't suitable please indicate your requirements in the 'Further comments' box on the back page of this form.

Section 8 - Terms and Conditions

- The Will writing service is administered by Irwin Mitchell. Irwin Mitchell is a limited liability partnership registered in England & Wales, with number OC343897, and is authorised and regulated by the Solicitors Regulation Authority
- The information requested in this form is to provide an indication of your wishes in relation to your Will. Once they have this information, Irwin Mitchell will contact you to collect payment, clarify the instructions provided and take any additional instructions needed to complete your Will. Additional terms and conditions will be sent on receipt of this form.
- By answering these questions and any subsequent questions raised by Irwin Mitchell, you confirm you are not subject to coercion or undue influence, and have a sufficient mental capacity to make a Will. If you are in doubt please contact Irwin Mitchell.

Please indicate if you:

Completed this form yourself

Had this form completed on your behalf by _____

If assistance was required, we'll need to contact you over the phone to confirm your instructions. Please ensure we've been provided with a telephone number

Approximate estate value:	£
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	Signature	Date
Applicant 1		
Applicant 2		

Making a Lasting Power of Attorney is arguably as important as making a Will. If you'd like more information on this, please tick this box (England and Wales only):

Please now complete the payment page on the back of the form.

Section 9 - Fees and Making Payments

Please tick which option you need (all prices are inclusive of VAT):

Single Standard - **£215**

Mirror Standard - **£330**

Single *Simple Amendment - **£165**

Mirror *Simple Amendment - **£210**

Asset Protection Trust - **£550**

Any other Trust or Complex Instruction**

* For this purpose a Simple Amendment can be defined as a change made to any of the following only:

- Names and addresses
- Guardianship clause
- Minor change to a gift to a named individual
- Funeral instructions
- The executorship clause.

Please note that if you're making any changes to the final distribution of your estate "the residue of your estate" then the standard Will prices above will apply.

**Other Trust or Complex instructions may include an additional fee, you'll be notified of this once we've received your instructions.

We will contact you with details of how to make payment, when we have received your form.

Completed forms can be returned by email to Wills@IrwinMitchell.com or by post to:
Irwin Mitchell LLP, Riverside East, 2 Millsands, Sheffield S3 8DT.

Further Comments