

Make a point of leaving a Will

Instruction booklet



in association with

irwinmitchell^(IM)
solicitors

Will writing

Instruction booklet

Please read this instruction booklet in conjunction with our 'Guidance notes'.

Please write in block capitals in black or blue ink

These instructions relate to a:

Single Will

Mirror Will

Discretionary Trust Mirror Will

Your personal details

Do you currently have a Will? Yes No

Title (Mr/Mrs/Ms/Miss/Other) Surname

Full forenames

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Full postal address

<input type="text"/>

Postcode

Home telephone number

Daytime telephone number

<input type="text"/>	<input type="text"/>
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Email address

Date of birth

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Your partner's* details (if applicable)

Title (Mr/Mrs/Ms/Miss/Other) Surname

Full forenames

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Full postal address (if different from above)

<input type="text"/>

Postcode

Home telephone number

Daytime telephone number

<input type="text"/>	<input type="text"/>
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Email address

Date of birth

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Children

	You		Partner*	
Do you have any children?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If Yes, How many are under 18?	<input type="text"/>		<input type="text"/>	
How many are over 18?	<input type="text"/>		<input type="text"/>	
Do you have any stepchildren?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If Yes, How many are under 18?	<input type="text"/>		<input type="text"/>	
How many are over 18?	<input type="text"/>		<input type="text"/>	
Do you have any grandchildren?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If Yes, How many are under 18?	<input type="text"/>		<input type="text"/>	
How many are over 18?	<input type="text"/>		<input type="text"/>	

Residency

Are you permanently resident in England or Wales?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you permanently resident in Scotland?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you permanently resident in Northern Ireland?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Are you permanently resident elsewhere?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
If yes, which country?	<input type="text"/>			

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Your personal circumstances

Please complete this page only if you are domiciled in England, Wales or Northern Ireland.

If you are unmarried or not in a civil partnership please complete this section.

Please note that in England, Wales and Northern Ireland marriage or entering into a civil partnership nullifies an existing Will unless it is written to take into account a specific marriage or civil partnership taking place.

If you are unmarried or not in a civil partnership, do you intend to marry or enter into a civil partnership in the near future? Yes No

If you do intend to marry or enter into a civil partnership in the near future, is the Will to be effective only after the marriage/civil partnership has taken place? Yes No

If the Will is to take effect prior to and continue to be effective after the marriage or civil partnership, must the marriage occur within a particular time? Yes No

If Yes by what date?

D	D	M	M	Y	Y	Y	Y
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Please give the full name of your future spouse/civil partner:

If you are married or in a civil partnership please complete this section.

Divorce or dissolution will affect gifts to your former spouse/civil partner or their appointment as Executor.

Are you:

- divorced or intending to be divorced or dissolve your civil partnership in the near future? Yes No
- separated, legally or otherwise, from your spouse/civil partner/partner or are you intending to become separated in the near future? Yes No

Dependants

Certain rights are given by law to your spouse, partner or civil partner, children and to anyone you are maintaining in whole or in part at the time of your death. Do you:

- have a spouse, partner or civil partner or child who will not be included in your Will? Yes No
- pay towards the maintenance of any person who will not benefit under your Will? Yes No

If the answer to either of the above is Yes, please give details and reasons below:

Joint assets (not with partner*)

Do you have any assets owned jointly **other than with your partner***? Yes No

If Yes, please give the following details:

Name(s) of joint owner(s)

Details of asset(s)

Total value of asset(s)

£

Share which you own

%

Foreign assets

Do you have any assets outside the United Kingdom?
eg properties abroad, offshore bank accounts, etc

Yes No

If Yes, please give details: (ie what asset is, country held in, approximate value)

Have you made a Will in the particular country or countries?

Yes No

Existing trusts

Are you a beneficiary under a current trust?

Yes No

You may not be receiving anything from the trust at the moment, however you may still be a named beneficiary who is liable to benefit in the future.

If Yes, please give details: (eg the type of trust, value, amount of income (if any), what happens on your death)

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Executors of your Will

Who do you wish to act as the executors of your Will?

- Irwin Mitchell solely
- Irwin Mitchell jointly with partner*
- Your partner* or Irwin Mitchell if they are unable to act
- Other (please indicate)

Funeral instructions

I want to be:

Buried Cremated No preference

My partner* wants to be:

Buried Cremated No preference

If you have any special instructions to be kept with your Will, please detail these separately.

Guardians

If you have any children under 18 years you may appoint Guardians to look after them in the event of your death (and your partner's death). Please place contact details in the box below.

Name

Address

Name

Address



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Personal items

England, Wales and Northern Ireland - Memorandum of Wishes

You may wish to have the option to leave certain possessions (cars, personal and household belongings) to beneficiaries, in a separate note written after you have signed your Will.

If you require this option, please tick here

Scotland - Informal writings

In Scotland it is possible to include within your Will a provision that a note signed by you and dated after the date of the Will will be given effect to. Such a note could include additional Legacies of specific items you want to leave, or funeral instructions. If you choose this option, we strongly recommend that your signature be witnessed by an independent witness who should sign the note and add his or her full name and address.

If you wish to be able to exercise this option in the future, please tick here

Please note, we do not recommend that you make substantial alterations to your Will by this method.

Please list any gifts or specific items or money that you wish to leave in your Will.

If you would like specifically to leave any personal items, please detail the item and who you would like to receive this item in the box below. Please include their name, address and when this gift is to be made (for example immediately on your death or on both deaths).

You:

Partner:

Remainder of your estate

You must now consider what remains of your estate after debts, taxes and any gifts listed have been taken out ('residue') and who you would like this to be left to. This can be your partner, children, a charity or other.

Listed below are the three most common ways of dealing with the 'residue' of an estate. If you are in any doubt, please contact us for advice.

Select one of the below:

- I wish to leave all the 'residue' of my estate to my partner*, but if he/she dies before me, to the people named below in equal shares.
- I wish to leave all the 'residue' of my estate to my partner*, but if he/she dies before me, to the people named below in the percentages indicated.
- I wish to leave all the 'residue' of my estate to the person(s) or organisations listed below in the percentages indicated.

Please provide names and addresses below. If the beneficiary is a child please also include the age at which you would like them to inherit:

In the event of the above named beneficiary/ies predeceasing you, do you want their children to receive their share?

Yes No

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Alternative wishes

Should you wish to make alternative provisions in the event of your main beneficiary/ies predeceasing you then please detail your alternative wishes below. Please include the full names and addresses of any beneficiaries and if they are minors at what age they are to receive their share.

If more than one beneficiary is listed please indicate the proportion of your estate that each beneficiary is to receive.

Declaration

Please read, complete and sign the declaration below. It is important that you read and understand the declaration section even if someone else has completed this form on your behalf.

I have completed these instructions myself Yes No
if not completed these instructions on my behalf

Their contact details are as follows:

I understand that:

- the information requested in this form is required for the purpose of preparing my Will and to ensure that my Will reflects my wishes. I/we agree that if, during the course of preparing my/our Will(s), it emerges that I/we require inheritance tax planning, Irwin Mitchell may pass information given by me/us on this form to Chelsea for the purpose of Chelsea introducing me/us to Aviva Life Services UK Limited for investments, pensions and wealth management. I/we agree that Chelsea may, in relation to this introduction, pass information about me/us given on this form to Aviva Life Services UK Limited who may hold and process such information for that purpose. Any financial advice given will relate only to the products of Chelsea and Aviva
- the information is being used by Irwin Mitchell who are responsible for preparing the Will
- Irwin Mitchell may contact me to confirm my instructions by phone, post or email
- information about me will be put on Chelsea's database and used to monitor service levels under its relationship with Irwin Mitchell
- if Irwin Mitchell are appointed as sole or one of my/our joint Executors, I/we acknowledge that Irwin Mitchell will charge for its services after my death in accordance with its scale of fees
- I certify that the information given in this form is true and complete.

Please note

- An additional charge will arise after your Will has been prepared if you make any changes to your wishes resulting in Irwin Mitchell redrafting your Will.
- Irwin Mitchell reserve the right to make an additional charge if the nature of the instructions require over and above what they would consider to be a reasonable time for preparing a Will. You will be advised of the estimated additional charge before any work is undertaken.
- Your details are held by Irwin Mitchell who are the data controller.
- You have the right to access your personal records held on Irwin Mitchell's files by written request to Irwin Mitchell Solicitors, Riverside East, 2 Millsands, Sheffield, S3 8DT and on payment of a fee.

1st signature

2nd signature

Date

Date

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Keeping you informed

Chelsea would like to give you details (by telephone and post) of its mortgage, savings, insurance and other products and services which we think you might be interested in. We would also like to pass your information to other selected organisations for the same purpose.

If you do not want us to do this please tick this box

Price list

Service	Price	VAT	Total price	Irwin Mitchell fee	Chelsea referral fee
Single Will	£95.00	£16.63	£111.63	£61.63	£50.00
Mirror Will	£155.00	£27.13	£182.13	£107.13	£75.00
Discretionary Trust Mirror Will	£380.00	£66.50	£446.50	£241.50	£205.00
Severance of joint tenancy*	£120.00	£21.00	£141.00	£116.00	£25.00

*For properties in Scotland, these prices may vary. If you require further legal work, you will need to be supplied with a new quote before you proceed.

Payment

Please tick your preferred payment method:

Cheque - Cheques should be made payable to Irwin Mitchell

Credit/debit card - Please complete and sign the following details so Irwin Mitchell can collect payment:

Card type (ie Visa/MasterCard/Switch)

Account name

Account number

Expiry date

Valid from date

(if relevant)

Issue number

(Switch cards only)

Amount to be debited

£

Last three digits on back of credit card

Signature of account holder

Date

For official use only (by Irwin Mitchell): Code

Will number

For Chelsea office use only

Customer no (if known)

Aviva consultant name

Branch

Campaign code

Staff member

Recommendation

IHT planning discussed
with Aviva Consultant

Staff

Source of contact

Tick relevant box

Poster

Existing customer

Customer review

Initial Aviva appointment

Existing Aviva customer review

IHT seminar

IHT open day



Contact us

Your local branch is:

Visit www.thechelsea.co.uk

For more information on our products visit our website.

Visit www.chelseacares.co.uk

To read our latest Corporate Responsibility report and find out how we plan to make a real difference at Chelsea.

Irwin Mitchell is operated by Irwin Mitchell LLP which is a limited liability partnership registered in England and Wales, company number OC343897. Other than in Scotland, Irwin Mitchell is regulated by the Solicitors Regulation Authority, registration number 51747.

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Yorkshire Building Society is a member of the Building Societies Association and is authorised and regulated by the Financial Services Authority (FSA registration number 106085).

Principal office of Yorkshire Building Society: Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ.

All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security.

Charges to 0845 numbers may vary. Prices can be checked with your phone provider. Mobile calls usually cost more.



This leaflet is also available in large print, Braille or as an audio tape. Please ask at any of our branches or telephone us on **0845 744 6622**.

Write to us at:

Chelsea Building Society

Thirlestaine Hall

Thirlestaine Road

Cheltenham

Gloucestershire GL53 7AL

www.thechelsea.co.uk

