

Key Workers Will Instruction Information

Thank you for choosing Ashtons Legal for your estate planning needs and for the amazing work you are doing in our community at this time.

Please complete the details below and send it back to us along with your preference for a video meeting time and your ID.

If you are just looking to complete one Will, rather than two ‘mirror Wills’ (Wills that are essentially the same for couples), then please just complete the Lead Client column.

|  |  |  |
| --- | --- | --- |
| Personal & Family Details | **Lead Client** | **Clients Partner** |
| Full name (including middle name(s)) |  |  |
| Address |  |  |
| Telephone No (mobile preferred) |  |  |
| Email Address |  |  |
| Date of birth |  |  |
| Is the address above your main place of residence? |  |  |
| Occupation |  |  |
| Marital Status |  |  |
| Do you have children by this marriage?  **If yes,** what are their full names and dates of birth? | Child 1 : | |
| Child 2 : | |
| Child 3: | |
| Child 4 : | |
| Child 5+: | |
| Do you have any children from previous marriages or relationships?  **If yes,** what are their names and dates of birth? | Child 1 : | Child 1 : |
| Child 2 : | Child 2 : |
| Child 3: | Child 3: |
| Child 4 : | Child 4 : |
| Child 5+: | Child 5+: |

|  |  |  |
| --- | --- | --- |
| **Assets** | | |
| **If you own your own home:** | | |
| What is the approximate value of your home? |  |  |
| Is the home in your sole name or joint names? |  |  |
| If you have a mortgage: How much do you still owe on your mortgage? |  |  |
| What other assets do you have?  e.g. Second Home Bank/Building Society accounts  Shares / equities (private or public)  Life Policies |  |  |
| **Executors** | | |
| The executor is the person who takes responsibility for carrying out the wishes in your Will. We usually recommend having at least 2 executors.  Who would you like as your two executors?  Enter names and relationship to you. |  |  |
| If you have children under 18 years of age, who do you want to be the Guardian(s) for your children? |  |  |
| **Bequests And Legacies** | | |
| Do you wish to make gifts of specific amounts? |  |  |
| Do you wish to make any gifts to charity? |  |  |
| **Gift of Residue**  **(The residue is everything not otherwise mentioned in the Will)** | | |
| Do you wish the residue of your estate to pass to your partner? |  |  |
| **If yes,** is this to be an absolute gift  (so that it will ultimately pass under their will)  OR a life interest (so that they have the income and use of the assets but ultimately they pass under the terms of your Will) |  |  |
| If your partner is not to inherit absolutely: Do you wish your estate to pass to your children? |  |  |
| If neither spouse nor children are to benefit, who do you wish to benefit? |  |  |
| Additional Information |  |  |
| Anything else for inclusion in Will? |  |  |
| Wishes for funeral/disposal of body |  |  |