

WILL INSTRUCTIONS SHEET

1. PERSONAL DETAILS (SINGLE WILL)

NAME	
ADDRESS	
CONTACT NO'S EMAIL ADDRESSES	
NATIONAL INSURANCE NUMBER	
DATE OF BIRTH	
MARITAL STATUS	

PERSONAL DETAILS (JOINT WILL)

NAME	
ADDRESS	
CONTACT NO'S	
NATIONAL INSURANCE NUMBER	
DATE OF BIRTH	
MARITAL STATUS	

2. LIST OF ASSETS INCLUDING PENSIONS (SOLE NAME)

ASSET

VALUE

PROPERTY	

3. LIST OF ASSETS INCLUDING PENSIONS (JOINTLY HELD)

ASSET	VALUE
PROPERTY	

4. LIABILITIES

WHERE	AMOUNT
MORTGAGE(S)	

5. CHILDREN

NAMES/DOB	ADDRESS

6. GUARDIANSHIP OF ANY INFANT CHILDREN (IF BOTH YOU AND YOUR SPOUSE DIE)

Guardians are the people you wish to care for any infant children you have at the time of your death. You should be aware that some

government departments and courts have the power to override the wishes you express on this issue in your will.

7. EXECUTORS

These are the people who carry out your wishes as stated in your will. You only have to appoint one but may appoint more. CO-EXECUTORS act together to administer your wishes. ALTERNATE EXECUTORS take the place of any primary executor who is unable to carry out his or her duties for you.

NAME/DOB/RELATIONSHIP	ADDRESS

8. FUNERAL WISHES

BURIAL	
CREMATION	

OTHER SPECIFIC FUNERAL WISHES	
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9. BENEFICIARIES

A. SPECIFIC GIFTS:

These are gifts of specific amounts of money or objects that you wish to make to a particular person. These objects will not pass with the balance of your estate. If you are planning to leave all of your assets to a single person you do not need to make specific gifts and should go direct to [residuary benefit](#).

NAME/ADDRESS/ RELATIONSHIP	ITEM OF GIFT

B. RESIDUARY ESTATE

The people named to receive the balance of your estate will receive everything you have not already given to any person as a specific gift. If there is only one beneficiary please list an alternate beneficiary in case the first beneficiary has died before you or is unable, for some other reason to take the assets you have left to him or her.

If the balance is to be shared between a number of people please indicate the share each person is to receive keeping in mind all percentages should add up to 100 and all fractions to one.

You can name as many or as few people as you wish

NAME/ADDRESS	REALTIONSHIP	HOW SPLIT (% OR EQUALLY)