



# A step-by-step guide to making your will



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Making a will is one of the most important things that any of us can do. It enables provisions to be made for those we care about and ensures that our wishes are carried out following death. It is also something that, although relatively straight forward in most cases, many of us put off doing.

## This short guide outlines the main things to consider when making a will.

### Step 1

We will need the following information:

- Your full name and address.
- Your occupation

### Step 2

You will need to think about who you would like to act as your Executors.

- Executors are the people who in conjunction with us deal with gathering in and distributing your estate after death.
- Although we act in the administration of the estate the role of the Executor is nevertheless an important and responsible one, so consider the people you appoint carefully.
- An Executor can be a beneficiary.

You may also need to think about appointing guardians. A guardian is appointed to look after any children who are under 18 who would otherwise be left without parents or guardians on your death.

### Step 3

You then need to consider who you want to benefit under your will. Think about:

- In general terms, who you want to benefit from your estate.
- The type of gifts you may wish to make. You may wish to make any or all of the following types of gift:

- (i) Specific gifts to particular people, for example particular items such as a piece or pieces of furniture, ornaments, jewellery, or collections.
- (ii) Gifts of specified sums of money, for example a gift of £100.00 to a named person or charity.
- (iii) Gifts of specified land or property to an individual or individuals.



- Who is or who are to take the remainder of your estate after any of the gifts mentioned above have been made. You may not need or want to make any of the types of gift mentioned above so that the estate as a whole is simply left to one person or to several individuals to be divided between them.
- What you want to happen if any of your beneficiaries should die before you.

#### ▲ Step 4

Once you have thought about how you wish your property to be distributed, we will be in a position to draft your will according to your wishes and have your will signed and witnessed.

We will always provide you with a copy of your will and we will store your original will safely and securely.

#### ▲ Step 5

Our team recommend that you should periodically review and update your will to ensure it is kept updated and reflects your current circumstances.

You should always review your will after significant life events such as:

- Marriage or divorce.
- The arrival of children or grandchildren.
- Purchasing property.
- Any financial changes.

