

MAKING A WILL

with



and



CONVEYANCING & WILLS

THOMPSONS SOLICITORS' POSTAL WILL MAKING SERVICE

ABOUT THOMPSONS SOLICITORS

Thompsons understand the concerns people have about dealing with the law. Over 85 years of representing the interests of working men and women and trade union members, has allowed us to develop a friendly, approachable service.

THOMPSONS SOLICITORS' WILL MAKING SERVICE

Making a Will need not be complicated. We offer this service for each member and their partner whether married or not and for partners of the same sex. This service can help you safeguard the interests of your family, friends and dependants – **and you don't even have to visit us!** Using our questionnaire, we can draft your Will from the information you provide.

NOTE: YOU CAN ALSO COMPLETE YOUR WILL QUESTIONNAIRE ONLINE. VISIT www.thompsons.law.co.uk/unison-wills.htm

The Wills questionnaire can be completed by either a single person (please give the details under the columns headed "Yourself"), or by a couple (please complete both columns "Yourself" and "Your Partner").

It is important for **both** partners to make Wills because you might die together. In any event you should provide for what should happen when you both die.

The word "partners" is used in this document to refer to all partners, whether married or unmarried, regardless of gender or sexuality.

WHAT DOES MAKING A WILL INVOLVE?

A legally drawn up Will is a written statement of your wishes. It enables you to make important decisions that affect your family and friends after your death.

Decisions such as:

- Who inherits your estate (i.e. everything you own)? – your **beneficiaries**?
- Who will act as **guardians** of your children?
- Who carries out your wishes? – your **executors** (and your executors may act as your trustees if your Will creates a Trust).
- Why would you create a Trust?
- Which charities are to benefit from your estate?

All of these issues can be incorporated in a Will. A properly drafted Will can spare your family and friends a lot of unnecessary work and heartache at a time when they are least able to cope with it. It also reduces the possibility of your Will being invalid or contestable.

You can alter your Will or cancel it at any time, but we will charge for any alterations at the reduced rate agreed with your union.

WHO WILL CARRY OUT MY WISHES WHEN I DIE?

Executors are people who administer – or execute – your affairs and being an executor does not prevent the person from also being a beneficiary of your estate. Husbands and wives or partners can appoint each other as first executors and two (or more) additional executors such as adult sons and daughters or professional people to act as your substitute executors in the event of both deaths. Please consider the appointment of your executors with care. The duties imposed by law on executors and trustees can be time consuming and can lead to personal liability.

The partners of Thompsons Solicitors are willing to act as executors of your estate, either solely or with a relative or trusted friend. Even when a Will appoints an executor, a **Grant of Probate** must generally be obtained from the Probate Registry. In addition, Capital Tax and Inland Revenue returns may need to be filed listing full details of assets. For these reasons executors and trustees nearly always instruct a solicitor to deal with the

administration of the estate. Thompsons Solicitors has an experienced Probate Department staffed by skilled solicitors who deal with the administration of estates.

Our costs are reasonable and are calculated on the basis of the amount of work involved, unlike the major banks who charge a percentage of the estate. Our costs can always be the subject of independent review and scrutiny by the Legal Services Ombudsman.

WHAT HAPPENS IF SOMEONE DIES WITHOUT MAKING A WILL?

- **Everything you own** will be divided up under fixed rules decided by law, not by you. These are known as Intestacy Rules.
- **You leave your relatives and friends** with the difficult task of sorting out your affairs.

One of the most common misconceptions is that if you die without a valid Will all of your estate will automatically go to your surviving partner. This isn't the case. Your partner could even end up with insufficient money to remain in the family home.

The law does **not** provide for unmarried partners or children who are not biological children of the parents (other than adopted children) and if you have no surviving blood relatives then your estate goes to the Crown.

WHAT ARRANGEMENTS SHOULD I MAKE ABOUT MY CHILDREN?

You should consider appointing a **legal guardian** to look after children who are under 18. When a parent dies, the surviving parent normally becomes the legal guardian. But you may die at the same time in which case it would be wise to appoint another member of your family or a close friend as a legal guardian.

Your trustees have power to pay money to the guardians for the maintenance, education and general welfare of your children.

Please note: *Unless the mother appoints him, an unmarried father will not automatically become the guardian of his natural child on the death of the mother.*

I DON'T WANT TO LEAVE ANYTHING TO MY FAMILY

You don't have to leave anything to your family in your Will, but if you do not make suitable financial provision for members of your immediate family or other people financially dependent on you, they may be able to contest your Will and claim a share of your estate.

WITNESSING THE WILL

There are very strict legal formalities which have to be complied with when signing your Will. We will give you clear and detailed instructions of those requirements.

The individuals may also need to act as trustees: for example, where money needs to be held in Trust for children under the age of 18 or where any other type of Trust arises under your Will.

LIVING WILLS

This is the name given to a Will which does not deal with matters after a person's death but seeks to control medical treatment before that person's death.

A Living Will may contain a statement or direction about that person's future medical treatment when they are no longer able to communicate the circumstances in which they do not want medical treatment.

In a Living Will, you can set out what medical treatment you wish to refuse in what circumstances. However, treatment to cause death cannot be directed.

QUESTIONNAIRE

DO NOT COMPLETE this form **BEFORE READING (AND DETACHING)** the explanatory notes and the sample at the end of the questionnaire.

All information provided will be treated as strictly confidential. Please complete in **BLOCK CAPITALS**, giving full names, addresses and the relationship to you of each person mentioned. **PLEASE TICK THE APPROPRIATE BOX WHERE NECESSARY.**

REMEMBER YOU CAN ALSO COMPLETE YOUR WILL QUESTIONNAIRE ONLINE. VISIT www.thompsons.law.co.uk/unison-wills.htm

FACTS ABOUT YOU AND YOUR FAMILY

	YOURSELF	YOUR PARTNER
1. Full name	Male <input type="checkbox"/> Female <input type="checkbox"/> <input type="text"/>	Male <input type="checkbox"/> Female <input type="checkbox"/> <input type="text"/>
2. Permanent address in England and Wales only. If you live elsewhere, please contact your trade union.	<input type="text"/> <input type="text"/> postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
3. Date of birth	<input type="text"/>	<input type="text"/>
4. Telephone number	Home <input type="text"/> Work <input type="text"/>	Home <input type="text"/> Work <input type="text"/>
5. Marital status (please tick any one or more boxes which are applicable)	Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Partner <input type="checkbox"/> Civil Partnership <input type="checkbox"/>	Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Partner <input type="checkbox"/> Civil Partnership <input type="checkbox"/>
6. Date of marriage	<input type="text"/>	<input type="text"/>
7. Date fixed for your wedding/formation of a civil partnership	<input type="text"/>	<input type="text"/>
8. Have you been married before?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
9. Do you have any children? If yes, state full names, dates of birth and addresses (if different from yours). If you are not the biological or adoptive parent of the child, please state your relationship to them.	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>
10. Is there anyone who is financially dependent on you that you DO NOT want to benefit from your Will? (e.g. former partner or children). If Yes, give name(s) AND full reasons. Please use a separate sheet if necessary.	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/>

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

FULL REASONS SHOULD BE GIVEN IF YOU WISH TO EXCLUDE ANYONE WHO IS FINANCIALLY DEPENDENT ON YOU. IF THAT PERSON MAKES A CLAIM AGAINST YOUR ESTATE, YOUR REASONS FOR EXCLUDING THEM WILL BE CONSIDERED IN COURT.

QUESTIONNAIRE

Thompsons Solicitors can act as sole executor or as a co-executor with a friend or member of the family. The administration of the estate is not part of the Will service. As executors we will be happy to offer the support and advice that is so vital for the efficient administration of the estate at a fee which will be agreed at the time of your death with your executors. If your partner is your sole beneficiary or most of your assets are held jointly, we would recommend that you appoint him/her as one of your executors.

	YOURSELF	YOUR PARTNER
<p>11. Whom do you wish to appoint as executors? (Please note – if you are naming children as beneficiaries under your Will, you should name two executors in addition to your partner, assuming that you wish your partner to be an executor). Please read the options (a) to (d) below and then tick one box to the right.</p> <p>(a) I wish my partner to act as my executor, but if they die before me I wish the two persons named to the right to act as my executors.</p> <p>(b) I wish Thompsons Solicitors to act as my sole executor.</p> <p>(c) I wish Thompsons Solicitors to act with the persons named to the right as my joint executors.</p> <p>(d) I wish the persons named to the right to act as my executors.</p> <p>If you have chosen option (a), (c) or (d) please state full names, addresses and relationships of your chosen executors in the box to the right.</p>	(a) <input type="checkbox"/> (b) <input type="checkbox"/> (c) <input type="checkbox"/> (d) <input type="checkbox"/> <div style="border: 1px solid black; height: 250px;"></div>	(a) <input type="checkbox"/> (b) <input type="checkbox"/> (c) <input type="checkbox"/> (d) <input type="checkbox"/> <div style="border: 1px solid black; height: 250px;"></div>
<p>12. Who do you wish to appoint as guardians after your partner has died? Please name the people who you would like to look after any children under 18 years of age you may have at the time of your death. Please limit guardians to two.</p>	<div style="border: 1px solid black; height: 80px;"></div>	<div style="border: 1px solid black; height: 80px;"></div>
<p>13. No child will inherit before the age of 18. In the meantime their share will be looked after by Trustees until they reach 18. Do you wish to state a different age, beyond 18, at which a child should inherit (e.g. 21, 25)? If Yes, tick the appropriate box and state the age to the right.</p>	Yes <input type="checkbox"/> No <input type="checkbox"/> <div style="border: 1px solid black; height: 20px;"></div>	Yes <input type="checkbox"/> No <input type="checkbox"/> <div style="border: 1px solid black; height: 20px;"></div>
<p>14. Do you want to make gifts of specific things or sums of money? If so please state details of gifts and full names and addresses of intended beneficiaries. Please remember to give a full description to avoid any misunderstandings later. You must include the beneficiaries' full names, addresses and their relationship to you.</p> <p>Please use a separate sheet if necessary.</p>	<div style="border: 1px solid black; height: 150px;"></div>	<div style="border: 1px solid black; height: 150px;"></div>

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

PLEASE REMEMBER TO GIVE FULL NAMES AND ADDRESSES

QUESTIONNAIRE

RESIDUARY GIFTS

	YOURSELF	YOUR PARTNER
15. (a) Do you wish your partner to inherit the whole estate (subject to the gifts in 14 above if any)? (b) If your partner has died before you or at the same time, who would you like to inherit your estate and in what proportions? (e.g. children) (c) If you do not want your partner to inherit the whole estate (subject to the gifts in 14 above) whom do you wish to inherit your estate? (e.g. children)	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/> <input type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> <input type="text"/> <input type="text"/>
16. Do you wish to donate any organs of your body for transplantation or therapeutic purposes (including organ transplant)? This does not cover medical research which can only be arranged prior to death with a teaching hospital.	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<p>Please note: <i>it is advisable to tell those close to you about your funeral wishes and whether you wish to donate any of your organs, since sometimes the Will is only looked at after the funeral.</i></p>		
17. (a) Do you wish to be buried or cremated? (b) Where? Please provide details.	Buried <input type="checkbox"/> Cremated <input type="checkbox"/> No preference <input type="checkbox"/> <input type="text"/>	Buried <input type="checkbox"/> Cremated <input type="checkbox"/> No preference <input type="checkbox"/> <input type="text"/>
18. Do you have any disability which makes reading or signing your Will difficult? If yes, please give details. Please use a separate sheet if necessary.	<input type="text"/>	<input type="text"/>

TRADE UNION MEMBERSHIP

19. Please confirm which union you belong to: _____ Membership number: _____	Union Sector: _____ Union Area: _____ Union Branch: _____	Union Sector: _____ Union Area: _____ Union Branch: _____
20. The postal Will service may not be appropriate for you but if you have a genuine medical reason for needing a Will urgently please tick this box. Wills cannot be prepared urgently because of holidays, separation or divorce under the postal scheme. Please state reason. Please use a separate sheet if necessary.	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>

DECLARATION

I declare that the above information is correct and that I wish my Will to be drawn up in these terms.

Signed:

Dated:

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

PLEASE REMEMBER TO GIVE ALL INFORMATION IN BLOCK CAPITALS

FINANCIAL CHECKLIST TO VALUE YOUR ESTATE

This information is received in strict confidence and will not be disclosed to anyone outside of Thompsons.
WE MAY NOT BE ABLE TO PREPARE YOUR WILL WITHOUT THIS INFORMATION.

PROPERTY AND CAPITAL ASSETS	YOURSELF		YOUR PARTNER	
(approximate values in £s only required)	<u>Your share of</u> Joint Property	Sole Property	<u>Your share of</u> Joint Property	Sole Property
Own home	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Other houses, land or buildings	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Household contents	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Cars, boats, etc.	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Jewellery	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Fine art/antiques	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Lump sums due (i.e. damages, inheritance, redundancy)	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Bank and building society accounts	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
National savings and premium bonds	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Stocks and shares	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Unit Trusts	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Life policies (please indicate whether they cover any mortgages or other loans)	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Death benefits under a pension arrangement	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Assets of any sort held outside England and Wales (please state where held). If you have a Will relating to foreign property please enclose a copy.	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Other assets	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Assets	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

LIABILITIES				
Home mortgage	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
2nd mortgage or further advance	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Bank loans	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Overdraft	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Credit card debt	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Other debts	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Total Liabilities	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

NET ESTATE				
Total Assets	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
Less Total Liabilities	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>
CURRENT VALUE OF YOUR ESTATE	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>

Please insert details of any lifetime gifts made within the last 14 years (if over £3000 in any one tax year) on a separate sheet.

HAVE YOU GIVEN FULL NAMES AND ADDRESSES?

THOMPSONS SOLICITORS' WILL MAKING SERVICE FOR TRADE UNION MEMBERS

Now send this form to: Thompsons Solicitors, WILLS DEPT, The New Union House, 2 Harbour Avenue, Plymouth, Devon PL4 0BJ

THOMPSONS SOLICITORS' POSTAL WILL MAKING SERVICE

CAN I ENSURE THAT MY PARTNER DOES NOT LEAVE THE ASSETS INHERITED BY HIM/HER UNDER MY WILL TO SOMEONE WHOM I WOULD NOT LIKE TO INHERIT THOSE ASSETS?

This can be ensured by giving your partner only a limited interest in your estate. This will mean that both your Will and the administration of your estate will become more complicated and that your estate will have to be held by your trustees upon Trust.

Examples include giving the right to live in your home to your partner during your partner's lifetime (or perhaps until your partner's (re)marriage); giving your partner the right to the income generated from the remainder of your estate during your partner's lifetime (or until your partner's (re)marriage).

This may involve work which falls outside the Wills scheme and is something for which we may have to charge extra.

ASSETS WHICH MAY NOT BE COVERED BY YOUR WILL

- **Death benefits under a pension scheme** are usually distributed at the discretion of the pension fund trustees. You should therefore let them know of your wishes. Often, they will require you to complete a nomination form indicating who you would like to benefit. We would advise you to review your nominations annually.
- **Life assurance policies**, if written in Trust, are payable to the named person(s), whatever your Will may say. We would advise you to check these annually.
- **Assets in joint names** may pass to the survivor. If you wish to leave your share of jointly-owned assets to someone other than your co-owner, you may need to take steps to divide the ownership of those assets. If, for example, the jointly-owned asset is your home you should have the wording of the title deeds checked. Normally, the title deeds are worded in such a way that your share would automatically pass to the other owner on your death. This requires conveyancing work such as drafting a declaration of ownership. This work falls outside the Wills scheme. Thompsons Solicitors has expertise in this area should you require this additional service.

IF I DIVORCE OR REMARRY DOES IT AFFECT MY WILL?

- A divorce treats a former spouse as if they were omitted from the Will. No gift will pass to them, and even if they are named as executors they cannot act as such. However, the rest of the Will remains valid.
- Marriage and remarriage are somewhat different. A marriage usually cancels any previous Will.
- As a result you could find you have no Will at all and the Intestacy Rules would apply.
- If you have set a date for a wedding please inform us so that an appropriate clause can be included in the Will to prevent your Will being cancelled.
- If you are married and co-habit with a new partner without getting divorced, do make sure you make provision for your new partner and any children. Otherwise, the legal spouse might be able to inherit under a Will you have made and not cancelled, or under the Intestacy Rules.

CIVIL PARTNERSHIPS

The dissolution of a civil partnership has the same effect on the partners' Wills as does divorce for married couples. The formation of a civil partnership revokes the partner's Will unless made in contemplation of their civil partnership. If you are (or about to be) in a civil partnership, please tell us.

IF LATER IN LIFE I SHOULD BECOME MENTALLY INFIRM, CAN I ARRANGE FOR A RELATIVE OR FRIEND TO LOOK AFTER MY AFFAIRS?

This is possible by way of an Enduring Power of Attorney which is a separate legal document that should not come into effect until you are incapable of managing your own affairs. You cannot make provision for this in your Will and it is not a service that the Thompsons Solicitors can provide.

You should, if you believe it is necessary, contact a local solicitor who will need to see you.

WHERE SHOULD I KEEP MY WILL?

You can lodge this with your bank or at the Probate Registry.

WHEN SHOULD I CHANGE MY WILL?

You do not need to make a new Will if anyone named in it changes address – you can simply leave a note of the new details with your Will. We advise that you should review your Will every two to five years, and especially when there is any major change in your life, such as marriage, separation, divorce, remarriage, a death or birth in the family.

We are always happy to discuss changes in your Will and will re-write your Will at the reduced rate agreed with your union.

THE FINANCIAL CHECKLIST

We suggest that you make a list of all of your assets which should include your home, life policies, your savings, car and other effects and at the same time, make a similar list of all your liabilities such as mortgage, overdrafts and other debts so as to work out the approximate value of your estate. We have included a financial checklist to assist you.

INHERITANCE TAX

Inheritance Tax or IHT, as it is sometimes referred to, is levied on a person's estate when they die.

For guidance on some of the main opportunities for minimising the impact of this tax, read our Inheritance Tax information page.

The information contained within this document was correct at the time of publishing in January 2009.

AND FINALLY . . .

We are an equal opportunities firm and all our services are available equally regardless of sex, race, age, disability, sexual orientation or religious belief. (Our service does not cover Northern Ireland or Scotland).

We comply with the Solicitors' Introduction and Referral Code published by the Law Society, and any solicitor to whom we may refer you is an independent professional from whom you will receive impartial and confidential advice. You are free to choose another solicitor.

Please complete the enclosed questionnaire giving **full forenames and full addresses** in block capitals of everyone you wish to mention – e.g. *Rebecca Ann Windsor* not *Becky A. Windsor*. Your application will be returned if not properly completed. Return the questionnaire together with the financial checklist, if appropriate, to Thompsons Solicitors' Wills Department at the address given below.

SAMPLE QUESTIONNAIRE

QUESTIONNAIRE

DO NOT COMPLETE this form **BEFORE READING (AND DETACHING)** the explanatory notes and the sample at the end of the questionnaire.
All information provided will be treated as strictly confidential. Please complete in **BLOCK CAPITALS**, giving full names, addresses and the relationship to you of each person mentioned. **PLEASE TICK THE APPROPRIATE BOX WHERE NECESSARY.**
REMEMBER YOU CAN ALSO COMPLETE YOUR ONLINE. VISIT www.thompsons-law.co.uk/unison-wills.htm

FACTS ABOUT YOU AND YOUR FAMILY

	YOURSELF	YOUR PARTNER
1. Full name	Male <input checked="" type="checkbox"/> Female <input type="checkbox"/> JAMES PATRICK WELLER	Male <input type="checkbox"/> Female <input checked="" type="checkbox"/> ANNE LOUISE WELLER
2. Permanent address in England and Wales only. If you live elsewhere, please contact your trade union.	37 SUNRISE HILL LEYTON LONDON postcode: E1 0G PQ	37 SUNRISE HILL LEYTON LONDON postcode: E1 0G PQ
3. Date of birth	10/04/54	28/02/62
4. Telephone number	Home: 020 8539 1554 Work: 020 7554 9231	Home: 020 8539 1554 Work: 020 7637 8541
5. Marital status (please tick any one or more boxes which are applicable)	Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Married <input checked="" type="checkbox"/> Widowed <input type="checkbox"/> Partner <input type="checkbox"/> Civil Partnership <input type="checkbox"/>	Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Married <input checked="" type="checkbox"/> Widowed <input type="checkbox"/> Partner <input type="checkbox"/> Civil Partnership <input type="checkbox"/>
6. Date of marriage	23/02/97	
7. Date fixed for your wedding/formation of a civil partnership	N/A	
8. Have you been married before?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
9. Do you have any children? If yes, state full names, dates of birth and addresses (if different from yours). If you are not the biological or adoptive parent of the child, please state your relationship to them.	THOMAS ARCHIBALD WELLER 06/01/95	THOMAS ARCHIBALD WELLER 06/01/95 (STEP MUM)
10. Is there anyone who is financially dependent on you that you DO NOT want to benefit from your Will? (e.g. former partner or child). If Yes, give name(s) AND full reasons. Please use a separate sheet if necessary.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

FULL REASONS SHOULD BE GIVEN IF YOU WANT TO EXCLUDE SOMEONE WHO IS FINANCIALLY DEPENDENT ON YOU. IF THAT PERSON MAKES A CLAIM AGAINST YOUR ESTATE, YOUR REASONS FOR EXCLUDING THEM WILL BE CONSIDERED IN COURT.

QUESTIONNAIRE

Thompsons Solicitors can act as sole executor or as a co-executor with a friend or member of the family. The administration of the estate is not part of the Will service. As executors we will be happy to offer the support and advice that is so vital for the efficient administration of the estate at a fee which will be agreed at the time of your death with your executors. If your partner is your sole beneficiary or most of your assets are held jointly, we would recommend that you appoint him/her as one of your executors.

	YOURSELF	YOUR PARTNER
11. Whom do you wish to appoint as executors? (Please note – if you are naming children as beneficiaries under your Will, you should name two executors in addition to your partner, assuming that you wish your partner to be an executor). Please read the options (a) to (d) below and then tick one box to the right. (a) I wish my partner to act as my executor, but if they die before me I wish the two persons named to the right to act as my executors. (b) I wish Thompsons Solicitors to act as my sole executor. (c) I wish Thompsons Solicitors to act with the persons named to the right as my joint executors. (d) I wish the persons named to the right to act as my executors. If you have chosen option (a), (c) or (d) please state full names, addresses and relationships of your chosen executors in the box to the right.	(a) <input type="checkbox"/> (b) <input type="checkbox"/> (c) <input checked="" type="checkbox"/> (d) <input type="checkbox"/> ANNE LOUISE WELLER (MY WIFE)	(a) <input checked="" type="checkbox"/> (b) <input type="checkbox"/> (c) <input type="checkbox"/> (d) <input type="checkbox"/> 1. GARY PAUL 25 TROUTBECK RD MANCHESTER M25 2QA (MY BROTHER) 2. CHARLOTTE SUMMERS 11 CHELMSFORD RD LEYTONSTONE E11 6HL (MY SISTER)
12. Do you wish to appoint as guardians after your partner has died? Please name the people who you would like to look after any children under 18 years of age you may have at the time of your death. Please limit guardians to two.	AS ABOVE	GARY PAUL OR CHARLOTTE SUMMERS AS ABOVE
13. No child will inherit before the age of 18. In the meantime their share will be looked after by Trustees until they reach 18. Do you wish to state a different age, beyond 18, at which a child should inherit (e.g. 21, 25)? If Yes, tick the appropriate box and state the age to the right.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> AGE 21	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> AGE 21
14. Do you want to make gifts of specific things or sums of money? If so please state details of gifts and full names and addresses of intended beneficiaries. Please remember to give a full description to avoid any misunderstandings later. You must include the beneficiaries' full names, addresses and their relationship to you. Please use a separate sheet if necessary.	MY CAMERA AND PHOTOGRAPHIC EQUIPMENT TO MY SON THOMAS ARCHIBALD WELLER	MY DIAMOND AND RUBY CLUSTER RING (FORMERLY MY MOTHERS) TO MY SISTER CHARLOTTE. OIL PAINTING OF MY FATHER TO MY BROTHER GARY.

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

PLEASE REMEMBER TO GIVE FULL NAMES AND ADDRESSES

QUESTIONNAIRE

RESIDUARY GIFTS

	YOURSELF	YOUR PARTNER
15. (a) Do you wish your partner to inherit the whole estate (subject to the gifts in 14 above if any)?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
(b) If your partner has died before you or at the same time, who would you like to inherit your estate and in what proportions? (e.g. children)	CHILDREN EQUALLY	CHILDREN EQUALLY
(c) If you do not want your partner to inherit the whole estate (subject to the gifts in 14 above) whom do you wish to inherit your estate? (e.g. children)		
16. Do you wish to donate any organs of your body for transplantation or therapeutic purposes (including organ transplant)? This does not cover medical research which can only be arranged prior to death with a teaching hospital.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
17. (a) Do you wish to be buried or cremated?	Buried <input type="checkbox"/> Cremated <input checked="" type="checkbox"/> No preference <input type="checkbox"/>	Buried <input type="checkbox"/> Cremated <input checked="" type="checkbox"/> No preference <input type="checkbox"/>
(b) Where? Please provide details.	I HAVE ATTACHED FULL INSTRUCTIONS	I HAVE ATTACHED DETAILS
18. Do you have any disability which makes reading or signing your Will difficult? If yes, please give details. Please use a separate sheet if necessary.		

TRADE UNION MEMBERSHIP

19. Please confirm which union you belong to:	Union Sector: ADMIN SUPPORT Union Area: SOUTH EAST Union Branch: HAVERING	Union Sector: N/A Union Area: N/A Union Branch: N/A
20. The postal Will service may not be appropriate for you but if you have a genuine medical reason for needing a Will urgently please tick this box. Wills cannot be prepared urgently because of holidays, separation or divorce under the postal scheme. Please state reason. Please use a separate sheet if necessary.	<input type="checkbox"/>	<input type="checkbox"/>

DECLARATION

I declare that the above information is correct and that I wish my Will to be drawn up in these terms.

Signed: James Weller A Weller
Dated: 21/12/05 21/12/05

PLEASE ATTACH EXTRA SHEETS IF NECESSARY

PLEASE REMEMBER TO GIVE ALL INFORMATION IN BLOCK CAPITALS

Ref: W011

FINANCIAL CHECKLIST TO VALUE YOUR ESTATE

This information is received in strict confidence and will not be disclosed to anyone outside of Thompsons. WE MAY NOT BE ABLE TO PREPARE YOUR WILL WITHOUT THIS INFORMATION.

PROPERTY AND CAPITAL ASSETS	YOURSELF		YOUR PARTNER	
	Your share of Joint Property	Sole Property	Your share of Joint Property	Sole Property
Own home	£ 100,000	£	£ 100,000	£
Other houses, land or buildings	£	£	£	£
Household contents	£ 4,000	£	£ 4,000	£
Cars, boats, etc.	£ 7,000	£	£ 1,000	£
Jewellery	£	£	£ 2,000	£
Fine art/antiques	£	£	£ 3,000	£
Lump sums due (i.e. damages, inheritance, redundancy)	£	£	£	£
Bank and building society accounts	£	£ 3,000	£	£ 1,500
National savings and premium bonds	£	£	£	£
Stocks and shares	£	£	£	£
Unit Trusts	£	£	£	£
Life policies (please indicate whether they cover any mortgages or other loans)	£ 90,000*	£ 100,000	£ 90,000*	£
Death benefits under a pension arrangement	£	£ 100,000	£	£
Assets of any sort held outside England and Wales (please state where held). If you have a Will relating to foreign property please enclose a copy.	£	£	£	£
Other assets	£	£	£	£
Total Assets	£	£	£	£
LIABILITIES				
Home mortgage	£ 45,000	£	£ 45,000	£
2nd mortgage or further advance	£	£	£	£
Bank loans	£	£	£	£
Overdraft	£	£	£	£
Credit card debt	£	£	£	£
Other debts	£	£	£	£
Total Liabilities	£	£	£	£
NET ESTATE				
Total Assets	£	£	£	£
Less Total Liabilities	£	£	£	£
CURRENT VALUE OF YOUR ESTATE	£	£	£	£

Please insert details of any lifetime gifts made within the last 14 years (if over £1000 in any one tax year) on a separate sheet.

*COVER MORTGAGE JOINT LIFE, FIRST DEATH

HAVE YOU GIVEN FULL NAMES AND ADDRESSES?

THOMPSONS SOLICITORS' WILL MAKING SERVICE FOR TRADE UNION MEMBERS
New send this form to: Thompsons Solicitors, WILLS DEPT, The New Union House, 2 Harbour Avenue, Plymouth, Devon PL4 0BJ