

Information we need to draft your Wills and Lasting Powers of Attorney

1. Your details

- Full names, including any middle names and any "also known as" names
- Dates of birth
- Full address, including post code
- Home and mobile telephone numbers
- Email addresses

2. Children, and grandchildren's details (including step / adopted children)

- Full names, including any middle names
- Dates of birth
- Full address, including post code

3. Choosing Your Executors

The role: Administering the estate after death. Can delegate some or all to a professional executor. Professional executor can be provided where necessary.

Criteria: Principally, sufficient levels of trust and capability. Are they willing to act? Are they in UK?

Usual choice: Each other and then grown up children/siblings/good friends.

Details needed: Full name (including middle name), relationship and address (including post code).

4. Choosing Your Trustees

The role: Manage any trust set up by the Will.

Criteria: Principally, sufficient levels of trust and capability. Are they willing to act? Are they in UK?

Usual choice: Each other and then grown up children/siblings/good friends.

Details needed: Full name (including middle name), relationship and address (including post code).

5. Choosing Guardians

The role: looking after, and brining up, children who are under 18; including making legal, financial, welfare and medical decisions.

Criteria: Raising children according to your lifestyle, values and religious beliefs? Are they willing to act?

Is it practical (age/location/financial/housing)?

Usual choice: Parents/older children/siblings/good friends.

Details needed: Full name (including middle name), relationship and address (including post code).



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6. Making Gifts

Do you want to make any monetary gifts to anyone or make gifts of specific items to specific people?
We will discuss in more detail in the call/meeting, if necessary.

7. Distribution of the estate

Primary beneficiary: is usually the spouse or partner, if there is one.

Secondary beneficiaries: are usually children and loved ones — you need to decide on %age shares.

Backstop beneficiaries: who would benefit if all above have passed away. Usually family/friends/charity

Details needed: Full name (including middle name), relationship and address (including post code).

8. Trusts

Used to protect and preserve wealth for your loved ones.

We will advise on the appropriate trusts, based upon your circumstances and objectives.

9. Choosing Attorneys (for your Lasting Powers of Attorney)

The role: To make financial & personal decisions for you in the future, if you are not able, or don't want to.

Criteria: Principally, sufficient levels of trust and capability. Are they willing to act? Do they live in UK?

Usual choice: each other and then grown up children/siblings/good friends.

Details needed: Full name (including middle name and title Mr/Ms/Miss/Mrs) and address (including post code), relationship AND dates of birth

If you can have the above information available when we take your instructions, it will be very helpful and make the process much quicker.

10. Payment

There are three ways of making payment

BACS payment to:

- A/C name: Anthony Morris Sales Services
- Sort code: 09-01-51
- A/C number: 84964180
- Reference: Surname and postcode/invoice number

Card payment:

- Most debit and credit cards accepted

Cheque payable to:

- Anthony Morris Sales Services