



# Will Writing Instruction Form

**The simple, straightforward way to make your wishes known**



# Will Instructions

To commence the Will Writing process you must now complete your personal information and detail how your estate should be distributed on your death. If you are unsure which Will is the most suitable for you please call Skipton Trustees Limited on **08709 002 180\***.

Please complete this form using black ink.

Please specify whether these instructions relate to a:

Single Will  Mirror Will  Discretionary Trust and Mirror Will

NB references to civil partnerships in these instructions apply to civil partnerships registered on or after 5 December 2005.

## Personal details

Title:  Surname:

Full Forenames:

Full Postal Address:

Postcode:

Date of Birth:  Town and County of Birth:

Home Tel No<sup>†</sup>:  Daytime Tel No<sup>†</sup>:

Email Address:

<sup>†</sup>Please complete so Skipton Trustees Limited can contact you to prepare your Will.

## Spouse/partner's details

Title:  Surname:

Full Forenames:

Full Postal Address:

Postcode:

Date of Birth:  Town and County of Birth:

Home Tel No<sup>†</sup>:  Daytime Tel No<sup>†</sup>:

Email Address:

<sup>†</sup>Please complete so Skipton Trustees Limited can contact you to prepare your Will.

Do you consider yourself to be permanently resident in England or Wales? Yes  No

Do you consider yourself to be permanently resident in Scotland? Yes  No

Do you consider yourself to be permanently resident in Northern Ireland? Yes  No

If you consider yourself to be permanently resident elsewhere, please state which country:

Are you married/or intending to be married in the near future? Yes  No

Are you entering into or are you already in a registered civil partnership? Yes  No

## Your estate

(Please refer to page eight of the Will Writing Guide)

Assets	You	Spouse/Partner/ Civil Partner	Jointly owned
Property Assets	<input type="text"/>	<input type="text"/>	<input type="text"/>
Remainder of Assets	<input type="text"/>	<input type="text"/>	<input type="text"/>
Liabilities	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Joint assets (not with spouse/partner/civil partner)

Do you have any UK assets owned jointly, with another person or organisation, who is not your spouse/partner/civil partner?

Yes  No

If 'Yes', please give the following details:

Name(s) of joint owner(s):	Total value of asset(s):	% share which you own:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Details of asset(s):

## Foreign assets

Do you have any assets outside the United Kingdom? Yes  No

If 'Yes', please give details: (ie what the asset is, country in which it is held and its approximate value):

Have you made a Will in the particular country or countries? Yes  No

# Existing trusts

Are you a beneficiary under a current trust? Yes  No

If 'Yes', please give details:

# Details of dependants

(children/stepchildren/grandchildren)

Number of children	<input type="checkbox"/>	Number under 18	<input type="checkbox"/>	Number over 18	<input type="checkbox"/>
Number of stepchildren	<input type="checkbox"/>	Number under 18	<input type="checkbox"/>	Number over 18	<input type="checkbox"/>
Number of grandchildren	<input type="checkbox"/>	Number under 18	<input type="checkbox"/>	Number over 18	<input type="checkbox"/>

# Executors

Please indicate who you wish to appoint as executors. If you are considering appointing Skipton Trustees Limited, please refer to the Estate Administration Guide.

Skipton Trustees Limited solely

Skipton Trustees Limited jointly with spouse/partner/civil partner

Your spouse/partner/civil partner or if they are unable to act, Skipton Trustees Limited

Other (please indicate)

Name:

Address:

Postcode:

# Funeral instructions

Do you wish your body to be:

Buried  Cremated  No preference

Does your spouse/partner/civil partner wish their body to be:

Buried  Cremated  No preference

If you have any special instructions, we suggest you detail these in a separate note which is kept with your Will.

# Guardians

If you have any children who are under 18 years of age you may appoint Guardians to look after them in the event of your death (and your spouse/partner/civil partner). **Please place contact details in the box below.**

Name:

Address:

Postcode:

# Gifts

Many people wish to make gifts of money or special items, these are known as 'legacies'.

You should now consider any gifts you wish to make, **please write details in the box below and attach an additional sheet if required.**

Gift	Name	Address	Relationship to you
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# The residue of your estate

You must now consider who will receive the 'residue' of your estate, which is what remains after your debts, taxes and any gifts listed above have been taken out. You can choose your spouse/partner/civil partner, your children, a charity or somebody else.

We have identified the three most common ways of dealing with the residue of an estate. Read them carefully and choose **one** which best suits you. If you are in doubt, let us know and we will advise you.

### Select one only:

- I wish to leave all the 'residue' of my estate to my partner, but if he/she dies before me, to the people named below.
- I wish to leave all the 'residue' of my estate to my partner, but if he/she dies before me, to the people named below in the percentages indicated.
- I wish to leave all the 'residue' of my estate to the person(s) or organisations listed below in the percentages indicated.

### Please provide names and addresses of residuary beneficiaries below:

Name	Address (inc. postcode)	Relationship to you	% of residue or equal shares
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Additional information

- Please tick if you would like to arrange a Lasting Power of Attorney for Property and Affairs and complete the Application Form enclosed.
- Please tick if you would like to arrange a General Power of Attorney and complete the Application Form enclosed.
- Please tick if you would like to arrange a Severance of Joint Tenancy.
- Please tick if you would like to arrange secure storage for your Will **free of charge**. Please note a retrieval fee is payable if your Will is to be amended by another solicitor.

Please use the space provided below (attach an additional sheet if required) for any special instructions or information you feel may be relevant for the preparation of your Will.

**Notes:**

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# Declaration

Please complete and sign the declaration and return the completed Form in the prepaid envelope provided.

Please prepare a Will for me based on the instructions contained in this Form.

This Instruction Form was completed by myself  or

**I understand that:**

- Skipton Will Writing Service is administered by Irwin Mitchell on behalf of Skipton Trustees Limited.
- Irwin Mitchell are regulated by the Solicitors Regulation Authority.
- The information requested in this Form is required for the purpose of preparing my Will and to ensure that the Will reflects my wishes.
- The information is being used by Skipton Trustees Limited, who through the Skipton Will Writing Service, are responsible for preparing the Will.
- I may be contacted to confirm my instructions.
- Skipton Trustees Limited will charge for its services for acting as Executor after my death in accordance with its scale of fees applicable at that time.
- I certify that the information given in this Form is true, complete and correctly represents my wishes.

**Please note:**

- An additional charge will arise after your Will has been prepared, should you make any alterations to your wishes that necessitates re-drafting your Will. Therefore please check carefully that this Form does reflect your wishes and nothing has been left out.
- Skipton Trustees Limited reserves the right to make an additional charge if the nature of your instructions are such that time over and above what would be considered to be a reasonable time for preparing a Will, is expanded in completing your Will. You will be advised of the estimated additional charge before any work is undertaken.
- Your details are held by Skipton Trustees Limited and Irwin Mitchell as joint data controllers.
- You have the right of access to your personal records held on Skipton Trustees Limited's files by written request to The Compliance Officer, Skipton Trustees Limited, The Bailey, Skipton, North Yorkshire BD23 1DN and The Compliance Officer, Irwin Mitchell, Riverside East, 2 Millsands, Sheffield S3 8DT.

# Keeping you informed

Skipton Trustees Limited and other companies within the Skipton Building Society Group (a list of whom is available on request) may use the information on this Form to provide you with details of selected products and services by post or by telephone. If you do not want to receive information by post, please tick this box .

If you do not want to receive information by telephone, please tick this box .

Only provide your email address if you wish to receive marketing information from Skipton Trustees Limited.

Email Address:

## Giving your consent to the use of your personal information

It is important that you read this page carefully as, by signing this application, you agree that we can use your information in the way as described above.

**I certify that the information given in this Form is true and complete and correctly represents my wishes.**

1st Signature:

2nd Signature:

Date:

Date:

# Will Writing service charges<sup>¥</sup>

We are committed to offering you value for money and explaining clearly what this service will cost.

The charges set out below reflect the work involved from the taking of instructions through to the storage of your Will. We have negotiated an excellent deal for the legal work required in the preparation of a Will with Irwin Mitchell. An administrative fee is payable by Skipton Trustees Limited (STL) to them for their work which is set out below.

Service	Cost (£)	VAT (£)	Total Charge (£)	Payment by STL to Irwin Mitchell (inc. VAT) (£)
Single Will	95.00	16.63	111.63	49.94
Mirror Will	150.00	26.25	176.25	74.91
Discretionary Will Trust and Mirror Will	375.00	65.63	440.63	164.79
Severance of Joint Tenancy				
England, Wales and Northern Ireland	86.67	15.17	101.84	94.88
Scotland	450.00	78.75	528.75	521.79
Lasting Power of Attorney – Property and Affairs <sup>f</sup>				
Single Person	398.50	69.74	468.24	346.63
Lasting Power of Attorney – Property and Affairs <sup>f</sup>				
Husband and Wife/Partners	493.00	86.28	579.28	440.63
General Power of Attorney – Single Person	180.00	31.50	211.50	89.89
General Power of Attorney				
Husband and Wife/Partners	220.00	38.50	258.50	119.85
Will retrieval fee <sup>#</sup>	25.00	4.38	29.38 <sup>#</sup>	0.00

<sup>¥</sup>See Tariff of Charges for full details. <sup>#</sup>A retrieval fee is payable if your Will is to be amended by another solicitor. Please note if any additional legal work is required, a new quotation will be provided for approval before proceeding. <sup>f</sup>Additional charges apply to register your Lasting Power of Attorney at the Office of the Public Guardian. Please see the Tariff of Charges for full details.

# Method of payment

Please tick your preferred payment method:

**By Cheque** – Please make your cheque payable to Skipton Trustees Limited and enclose your payment with your completed Will Writing Instruction Form

**OR**

**By Credit/Debit Card** – Please complete the following details and sign below in order that Skipton Trustees Limited can collect the payment:

Card Type:	<input type="text"/>	(ie Visa/Mastercard/Maestro)
Account Name:	<input type="text"/>	
Account Number:	<input type="text"/>	
Expiry Date:	<input type="text"/> <input type="text"/> (MM/YY)	Valid from date: <input type="text"/> <input type="text"/> (MM/YY if relevant)
Issue Number:	<input type="text"/> <input type="text"/> (Debit cards only)	
Amount Debited:	<input type="text"/>	
Signature of Account Holder:	<input type="text"/>	
Date:	<input type="text"/>	

For official use only:

Code:

Will number:

## Office use only

Introducer:	<input type="text"/>	(if known)		
Staff name:	<input type="text"/>	Staff number: <input type="text"/>		
Marketing:	<input type="checkbox"/>	Campaign Code: <input type="text"/>		
Referral	<input type="checkbox"/>	Recommendation <input type="checkbox"/>	Self-generated <input type="checkbox"/>	Staff <input type="checkbox"/>

Skipton Trustees Limited, The Bailey, Skipton, North Yorkshire BD23 1DN

Telephone: **08709 002 180\***

Skipton Trustees Limited registered office is situated at The Bailey, Skipton, North Yorkshire BD23 1DN. Registered in England no. 6258324.

Skipton Will Writing Service is administered by Irwin Mitchell of Riverside East, 2 Millsands, Sheffield S3 8DT, who are regulated by the Solicitors Regulation Authority. Skipton Estate and Trust Administration Service is administered by Pearson Jones plc of Clayton Wood Close, West Park Ring Road, Leeds LS16 6QE or Irwin Mitchell.

Asset Property Management, Valuation Services, Estate Agency and Conveyancing arranged through Connells Residential, a subsidiary of Skipton Building Society, whose registered office is situated at Cumbria House, 16-20 Hockliffe Street, Leighton Buzzard, Bedfordshire LU7 1HJ.

\*To help maintain service and quality, some telephone calls may be recorded and monitored.

