

We offer a full range of Wills and on receipt of your instructions one of our solicitors will be happy to discuss your requirements to ensure that the correct style of Will is prepared for you.

To commence the will writing process we would ask that you answer the following questions:

Do you consider anywhere other than Scotland to be your permanent home?	Yes/No
Do you own a share in a business?	Yes/No
Are you leaving anything of value to someone who has a learning disability and/or is reliant upon means tested benefit?	Yes/No
Do you own anything jointly with anyone other than your spouse or partner?	Yes/No
If you add up the value of everything you own does it come to more than £325,000 (if you are single, divorced or widowed); or £650,000 (if you are married/ in a civil partnership)?	Yes/No
Do you own anything outside Scotland?	Yes/No
Do you wish to leave your house or your share in it as a separate gift in your will to anyone other than your spouse or partner?	Yes/No
Do you wish to leave a timeshare/land/buildings/intellectual property as a separate gift in your Will?	Yes/No

About You

Please enter the following details about you

Title: Mr/Mrs/Ms/Ms/Other	Full Postal Address:
Surname:	
Full Forenames:	Telephone No:
Date of Birth:	Email Address:

What is your marital status?

Married ☐ In a civil partnership ☐ Living with partner ☐
Single/Divorced ☐ Separated ☐ Widowed ☐

About your Spouse/Partner

Please enter the following details about your spouse/partner

Title: Mr/Mrs/Ms/Ms/Other	Full Postal Address:
Surname:	
Full Forenames:	Telephone No:
Date of Birth:	Email Address:

About your children

Please enter the following details about your children

Name of Child	Date of Birth	Home Address

About your assets

We need to understand the extent of your estate and the type of possessions/assets that you have. This will allow us to ensure that your Will is complete and that we have identified your potential liability to Inheritance Tax.

Please enter the following details about the value of your assets

Assets	You	Your Spouse/Partner	Jointly Owned
Property Assets			
Other Assets			
Liabilities			

Executors

An Executor is responsible for ensuring that the instructions contained in your Will are carried out after your death. This can be a complicated roll and some people prefer to appoint a professional to deal with the estate. Your solicitor at Paris Steele W.S. will be happy to discuss his or her appointment to act as a professional executor to your estate on receipt your instructions.

Please indicate who you wish to appoint as executors

My solicitor at Paris Steele W.S. should act as my Executor ☐

My Spouse/Partner should act as my Executor ☐

My Spouse/Partner and my solicitor should act as my Executor ☐

Other: (please specify below) ☐

Guardians for Children

It is possible to express your wishes about who you would like to look after your children in your Will. Please indicate who you would wish to be the Guardian of your children

Name of Child	Name and address of Proposed Guardian

Funeral Wishes

We can include details about your funeral wishes in your Will. However please be aware that these instructions are not binding on your executors. We recommend that you tell your family about your funeral wishes so that they are aware of your wishes and can make appropriate arrangements when you die.

Please indicate your funeral wishes

I wish to be buried ☐

I wish to be cremated ☐

I have no specific funeral wishes ☐

I am interested in receiving information on a pre-paid funeral plan ☐

Specific Legacies

Many people wish to leave a sum of money (a “pecuniary legacy”) or an item of property (a “specific legacy”) to a particular person or charity. If you wish to do so please indicate your wishes

Gift/Legacy	Recipient	Recipient's address	Their relationship to you

Residue of your estate

The remainder of your estate (not included above as a specific or pecuniary legacy) forms the residue of your estate. Please indicate your wishes

I wish to leave the residue of my estate to my spouse/partner ☐
whom failing my children

I wish to leave the residue of my estate to the following person(s) ☐

Additional Information

If you have any additional information that you feel will be helpful to writing your Will, please use the box below.