

MAKING A WILL

In order to draw up your Will it is vitally important that we have all relevant information and we would ask you to complete the following and either return the form via post to our Stirling office or via email to jireland@macgregorthomson.co.uk

YOUR FULL NAME:

(including middle names)

YOUR ADDRESS:

EXECUTORS: (1)

(full names and addresses)

(2)

NB Your Executors are the people appointed by you to oversee the administration of your estate. Only one Executor is required but we normally recommend that at least two Executors are appointed in case one Executor predeceased you or declines the appointment. You Executors may be anyone, including family, friends or your solicitor, and being a beneficiary under your Will does not stop anyone being an Executor. Many people wish someone independent as one of their Executors and one of our partners would be happy to act as your Executor.

After payment of funeral charges, outstanding tax and debts, your estate is, with some restrictions, yours to dispose of as you wish. Initially you may wish to make certain specific legacies including cash, jewellery, furniture, shares, etc.

Macgregor Thomson Limited Solicitors

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Please list any specific legacies and the beneficiary in each case:-

ITEM / AMOUNT

BENEFICIARY

(1)

Full Name:

Address:

(2)

Full Name:

Address:

After all specific legacies have been satisfied, the balance of your estate is “the residue”. Please let us know who you wish the beneficiary/beneficiaries of the residue of your estate.

Full Name

Address

(1)

(2)

If the beneficiary of the residue predeceases you or is involved with you in a “common calamity” then we recommend that you make provision for an alternative beneficiary of the residue.

Full Name

Address

(1)

(2)

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Please advise if you wish to name guardians for your children.

Full Name

Address

(1)

(2)

Finally, you may have a preference to be buried or cremated and we would recommend that you declare your preference in your Will.

(Please tick the appropriate box)

Burial

Cremation

NB PLEASE NOTE THAT THE ABOVE INFORMATION WILL ALLOW US TO DRAW UP A STRAIGHTFORWARD WILL FOR YOUR CONSIDERATION. WE WOULD WISH TO DISCUSS ALL RELEVANT DETAILS WITH YOU AND IT MAY BE THAT A MORE COMPLEX WILL IS REQUIRED TO MEET YOUR NEEDS, I.E. IF FUNDS ARE TO BE LEFT IN TRUST FOR A BENEFICIARY. THE FINAL SIGNED DOCUMENTS WILL BE KEPT IN OUR WILLS SAFE FOR SAFEKEEPING. A COPY WILL BE PROVIDED FOR YOU.

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