



WILLS



▪ Fees

The cost of a 'standard' single person Will is **£140.00 + VAT**. We charge **£200.00 + VAT** to prepare mirrored 'couple' Wills. Should your Will include either numerous individual gifts or trust provisions it may be necessary to charge at an hourly rate. We will confirm the same during our initial meeting with you together with an estimate of our firm's fees if this is applicable.

▪ Appointments

Appointments are available in our Mitcham and Crawley offices. Home visits/out of hours appointments also available (there will be an additional cost for these).

Please contact Dominique Harper in our Mitcham office on **020 8646 4885** or Kay Leake on **01293 518 074** in our Crawley office who will be able to arrange an appointment for you. Alternatively e-mail legal@p-llp.net.

▪ ID

We will need to see **two forms of ID** – either a passport or drivers licence (+ counterpart) and either a bank statement or utility bill.

▪ Register and Store your Will

As an extra service to you we can **register your will** with the National Database of Wills, **Certainty** and **store your signed original Will** in a secure, purpose-built storage facility as well as keep a scanned electronic version on our system.

You will have the peace of mind knowing that your Will is in a safe place and may be retrieved very quickly when required also you are protected from fraudulent versions of your will appearing through the provision of a certificate from Certainty as to where your original will is stored. Certainty recommend that we charge **£25 + VAT** for registering the will with them. In addition we usually charge **£25 + VAT** for storing your will. However for a promotional period we are offering a one-off charge of **£25 + VAT** for registering your will with Certainty and arranging the safe storage of your will.

If you are interested in making a Will please complete the attached Questionnaire to the best of your ability. We will discuss this during our initial meeting and therefore do not worry if you cannot answer every question.

Preuveneers LLP Solicitors with Notaries

Mitcham office: 020 8646 4885 Crawley office: 01293 518 074

103-105 London Road Mitcham, Surrey CR4 2JA
9 The Boulevard Crawley West Sussex RH10 1UR
Legal@p-llp.net

Terms and conditions of business in respect of your Will

Thank you for instructing us in connection with the preparation and execution of your will. We set out below our standard terms and conditions of business. Please read through these and then sign where indicated.

We aim to offer all our clients an efficient and professional service and will at all times act in your best interest. However should there be any aspect of our service you consider not to be undertaken in your best interests, you can simply come into the office or telephone the firm between 9am and 5.15pm on 020 8646 4885 (Mitcham office) or 01293 518 074 (Crawley office) in order to discuss the same. We will be happy to arrange out of hours and home appointments for elderly or disabled clients.

The duty of confidentiality is fundamental to the solicitor - client relationship. As solicitors, we are under a duty to keep confidential to the firm - all client matters and to ensure all staff within Preuveneers LLP do the same.

Your Will, will be prepared by

We have provided you with a will questionnaire which we would ask you to complete so that we can discuss it at our initial meeting. We will prepare your will based on the details provided to us and discussed. If you have a previous will we would ask that you also provide us with a copy of this.

Our fees for preparing a standard will are £140 plus VAT for a single will and £200 plus VAT for wills for both partners in a relationship. Please note that In the event that your will contains a number of gifts or trust provisions there will be an additional cost and we will advise you of this at our initial meeting. Unless agreed otherwise we will require full payment at our initial meeting.

Once your will has been prepared we will arrange for you to come back to double check the contents of the will and execute the same. Two members of the firm will act as your witnesses.

As an extra service to you we can **register your will** with the National Database of Wills, **Certainty** and **store your signed original Will** in a secure, purpose-built storage facility as well as keep a scanned electronic version on our system.

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I would like my will registered and stored

I would like my will stored only

I do not require my will to be registered or stored

I have read and understood the above

Signed

Dated

Preuveneers LLP Will Questionnaire

Please complete all questions to the best of your ability. We will fully discuss the contents of this Questionnaire at our meeting so if you have difficulty with any question or any queries we will deal with the same at the meeting.

Section 1 – personal details

Full name	
Are you known by any other name?	Are there any assets held in this name? <input type="checkbox"/> Yes <input type="checkbox"/> No
Address	
Telephone numbers	Home: Mobile:
E-mail address	

Have you made a Will before? If so, please provide us with a copy of your current Will (this is not essential if it cannot be located)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Please note down any time constraints (e.g. illness or travel arrangements) affecting the urgency of when your Will is required.	

Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed
If married, please confirm the full name of your husband/wife
Are you likely to be getting married within the next two years? <input type="checkbox"/> Yes <input type="checkbox"/> No

Do you have any children? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please list them ALL below together with their date of birth if under 18		
Child's name	Date of birth (if under 18)	Over 18
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Section 2 – Executors

You need to appoint a person or persons (a maximum of four) to administer your Will. These people will be your Executors/Trustees. They will ensure that the directions in your Will are carried out. There are advantages in appointing a professional Executor or Trustee, especially when Will trusts are created or advice on tax and investments is needed. Sometime impartial advice is particularly useful when family members are involved.

Would you like this firm to act as an Executor Yes No

Please set out below the names of the person/people you would like to act as Executor(s). You should ensure that these are people that you trust. Please note, if your Executor is based abroad this can cause difficulties in administering your Will. It is therefore better, if possible, to name Executor(s) based in the UK.

Full name	Address	Relationship to you

In the event that the person/persons named as Executors/Trustees above are unable or unwilling to act for you, please state the names and addresses of the person/persons who you wish to appoint in their substitution. You do not have to appoint any substitute Executors if you do not wish to.

Full name	Address	Relationship to you

Section 3 – Guardianship

If you have any children under the age of 18 years you should consider the appointment of guardians. If you wish to include this in your Will please complete this section: -

Do you want to appoint the same guardian for all your minor children? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you wish to include any conditions regarding your child's upbringing? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, please specify

Please set out below the names of the person/people you would like to be your guardians. If naming more than one then they should, ideally, live at the same address as this will make things easier in the future.

Full name	Address	Relationship to you

Section 4 – Funeral directions

Please state any specific instructions regarding your funeral i.e. to be cremated or buried. You do not have to include this in your Will and in any event should ensure the members of your family are aware of your wishes.

Section 5 – Assets

In order that we may advise you fully please answer the following questions. This information is not compulsory but it will assist us in ensuring we deal with all relevant factors when considering your Will.

Do you have any assets abroad? Yes No

If so, have you made a separate Will to deal with those assets? Yes No

Do you own any property in the UK? Yes No

If yes, is this property held in your sole name or jointly with another person?

Sole name Jointly with another person

If yes, do you know whether you own the property as joint tenants or tenants-in-common?

Joint tenants Tenants-in-common Do not know

In order that we may advise you fully, please confirm a rough estimate of the total value of your net assets – this is the value of your assets less any debts (including mortgages).

Section 6 – Monetary Gifts

Do you want to leave a gift of money to anyone (inc. charities) <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please confirm how much and to who below			
Name	Address	Relationship	How much?

Section 7 – Specific Gifts

Do you want to leave a specific gift (i.e. jewellery, a house, a car etc) to anyone (inc. charities) <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please confirm what the gift is and to who below			
Name	Address	Relationship	Gift?

Section 8 – Interests in property

If you own any property do you wish to give another person a right to stay in that property until a certain time? If so, please provide details and we can discuss this at our meeting.

Full name	Address of property	Relationship to you

Section 9 – Residuary Estate

The rest of your estate which you have not given away in any specific gifts is referred to as your residual estate. This includes everything you own, it is usual that there is a clause in your will stating that the residual estate is to be left to someone. You can leave this equally between people or in unequal shares. Please state who you wish to leave your residual estate to and their relationship to you.

Name	Address	Relationship	% of Estate?

It is usual to make a substituted gift of your residual estate incase the person/persons mentioned above are unable to take the gift. Please state who should receive your residual estate in substitution and their relationship to you.

Name	Address	Relationship	% of Estate?