# Online Instruction Sheet

Instruction take	rs name				
Instruction takers email					
My / Clients details					
Full Name Email					
Address 1					
Address 2					
Town	Country				
Post Code  Gender Male	e Female				
Male Male	remaie				
Partners Details					
First Name					
Relationship	Spouse Partner Fiancee Same sex partner Civil Partner				

### **My Appointments**

# **My/Clients Executors**

Name	
Address	
Relationship to Testator Relationship to Spouse/Partner	
Name	
Address	
Polotionalista Tortatas	
Relationship to Testator Relationship to Spouse/Partner	
Name	
Address	
Relationship to Testator Relationship to Spouse/Partner	
My/Clients Guardians	
Name	
Address	
Address	
Relationship to Testator Relationship to Spouse/Partner	
Name	
Name	
Address	
Relationship to Relationship to Spouse/Partner	
neiationship to Spouse/Partner	

### **My/Clients Reserve Guardians**

Name						
Address						
Relationship to Testator	Relationship to Spouse/Partner					
Name						
Address						
Relationship to Testator	Relationship to Spouse/Partner					
Main Distribution						
	Do you want the MAIN part of your estate to go to your partner?					
	☐ Yes ☐ No					
Option 1						
The Family						
Child Name 1						
Relationship to: Testator	Spouse/partner					
Child Name 2						
Relationship to: Testator	Spouse/partner Spouse/partner					
neiationship to. Testator	3pouse/partitei					
Child Name 3						
Relationship to: Testator	Spouse/partner					
>						
Child Name 4						
Relationship to: Testator	Spouse/partner					

OR

# Option 2

Named People	Are the l		☐ Equal Shares	
Full Name				% Percentage
Relationship to:	Testator	Spouse/partner		
Full Name				% Percentage
Relationship to:	Testator	Spouse/partner		
Full Name				% Percentage
Relationship to:	Testator	Spouse/partner		
Full Name				% Percentage
Relationship to:	Testator	Spouse/partner		
My/Clien	ts Reserve	Beneficiaries		
		Beneficiaries  ag equal shares or percentages?   Equal Shares	☐ Percentage	
Name 1	neficiaries havin	g equal shares or percentages?   Equal Shares		% Percentage
are the reserve be	neficiaries havin			% Percentage
Name 1	neficiaries havin	g equal shares or percentages?   Equal Shares		% Percentage
Name 1 Relationship to:	neficiaries havin	g equal shares or percentages?   Equal Shares		
Name 1 Relationship to:	neficiaries havin	g equal shares or percentages?   Equal Shares  Spouse/partner		
Name 1 Relationship to: Name 2 Relationship to:	neficiaries havin	g equal shares or percentages?   Equal Shares  Spouse/partner		% Percentage
Name 1 Relationship to: Name 2 Relationship to:	Testator  Testator	Spouse/partner		% Percentage

### **Specific Legacies**

From Testator

### Recipient Recipient Gift Gift Second death gift? Second death gift? Relationship Relationship Recipient Recipient Gift Gift Second death gift? Second death gift? Relationship Relationship Recipient Recipient Gift Gift Second death gift? Second death gift? Relationship Relationship **Monetary Legacies From Testator** From Spouse / Partner Recipient Recipient Gift Gift Second death gift? Second death gift? Relationship Relationship Recipient Recipient Gift Gift Second death gift? Relationship Second death gift? Relationship Recipient Recipient Gift Gift Second death gift? Second death gift? Relationship Relationship

From Spouse / Partner

### **Funeral Requests**

My Requests	My Spouse/Partners Requests Funeral Arrangements		
Funeral Arrangements			
i.e. Burial/Cremation/None	i.e. Burial/Cremation/None		
For my funeral I request that	For my funeral I request that		
I desire that	I desire that		