

Online Instruction Sheet

Instruction takers name

Instruction takers email

My / Clients details

Full Name

Email

Address 1

Address 2

Town

Country

Post Code

Gender

Male

Female

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

Relationship to Testator Relationship to Spouse/Partner

Name

Address

Relationship to Testator Relationship to Spouse/Partner

My/Clients Guardians

Name

Address

Relationship to Testator Relationship to Spouse/Partner

Name

Address

Relationship to Testator Relationship 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

Child Name 3
Relationship to: Testator Spouse/partner

Child Name 4
Relationship to: Testator Spouse/partner

Age of attainment

OR

Option 2

Named People

Are the beneficiaries having equal shares or percentages?

Equal Shares

Percentage

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/Clients Reserve Beneficiaries

Are the reserve beneficiaries having equal shares or percentages?

Equal Shares

Percentage

Name 1

% Percentage

Relationship to: Testator

Spouse/partner

Name 2

% Percentage

Relationship to: Testator

Spouse/partner

Name 3

% Percentage

Relationship to: Testator

Spouse/partner

Name 4

% Percentage

Relationship to: Testator

Spouse/partner

Specific Legacies

From Testator

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

From Spouse / Partner

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Monetary Legacies

From Testator

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

From Spouse / Partner

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Recipient
Gift
Relationship Second death gift?

Funeral Requests

My Requests

Funeral Arrangements

i.e. Burial/Cremation/None

My Spouse/Partners Requests

Funeral Arrangements

i.e. Burial/Cremation/None

For my funeral I request that..

I desire that...

For my funeral I request that..

I desire that..