

WHAT INFORMATION WE NEED TO MAKE YOUR WILL

- **Your full name**
- **Any other name by which you are, or have been, known**
- **Your address**
- **Your date of birth**
- **Whether or not you are married or in a civil partnership**
- **Details of any previous spouses or civil partners and when and how that relationship ended**
- **Details of the people, organisations or charities whom you wish to benefit under your will. We will need their full names, their addresses, their relationship to you (if any) and their date of birth. In the case of charities it may help if you can bring in details of their Registered Charity number**
- **Details of any close relatives or dependants whom you do NOT want to benefit under your will – we will probably ask you to explain the circumstances and reason for this decision to avoid problems after you have died**
- **Details of your assets:**
 - i. **Freehold or Leasehold properties in the UK with their approximate value (we will ask you for the approximate amount owing under any mortgages or other loans secured against the property)**
 - ii. **Overseas properties and any mortgages secured on them**
 - iii. **Bank and Building Society accounts with approximate balances held**
 - iv. **National Savings Certificates, Bonds or ISAs with their approximate values**
 - v. **Other investments, such as stocks and shares, unit or investment trusts with their approximate values**