

Will Review - Checklist

Since making your last Will:

About You	Yes	No
Have you changed your name or address?		
Have you got married or formed a civil partnership?		
Have you started living with a partner?		
Have you separated from a partner, got divorced or ended a civil partnership?		
Has your husband, wife or partner died?		
Have you had children?		
Do you have more children now than you have named in your Will?		
Have your financial circumstances changed significantly?		
Have you given away, sold or lost any item specified as a gift in your Will?		
Do you own property abroad?		
Do you own a business or share in a business?		
Are you concerned about inheritance tax?		
About Your Beneficiaries		
Have you changed your mind about who should inherit?		
Would you like to change how your estate is distributed between your beneficiaries?		
Have any of your beneficiaries died?		
Have any of your beneficiaries changed their names or addresses?		
Are any of your beneficiaries vulnerable due to age, disability or lifestyle?		
Would you like to find out how Trusts can help protect assets for future generations?		
About Your Executors/Trustees		
Have you changed your mind about who should act as executors/trustees?		
Do you have any concerns about the age, health or mental capacity of your executors/trustees?		
Have any of your executors/trustees changed their names or addresses?		
About Your Guardians (for your children aged under 18)		
Have you changed your mind about who should act as guardians?		
Do you have any concerns about the age, health or mental capacity of your guardians?		
Have any of your guardians changed their names or addresses?		
Are all your children now over the age of 18?		

**Have you answered “yes” to any of the above?
Contact us today to review your Will**