



Client CONFIDENTIAL Basic Wishes

Client 1 Client 2

Personal

Clients Full Name

Two yellow boxes for Client 1 and Client 2 names.

The information on these sheets is essential in the drafting of your Will's. Please complete fully and carefully check all details are correct before returning. If you're unsure, please don't hesitate to ask for guidance.

Witnesses (leave blank if using Rugby Wills Witnessing Service)

The Witnesses physically witness the signing of the Will and sign it themselves to attest to that. They do not see the contents of the Will

Witness 1 Full Name, Address Street, Area, Town, County, PostCode, Email, Occupation

Form for Witness 1 details.

Witness 2 Full Name, Address Street, Area, Town, County, PostCode, Email, Occupation

Form for Witness 2 details.

Executors

The executors carry out the wishes of the Will. Usually a couple executes each others Will.

Executor 1 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Executor 1 details.

Executor 2 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Executor 2 details.

Guardians (if required)

The Guardians look after your children as if they were the parents

Guardian 1 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Guardian 1 details.

Guardian 2 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Guardian 2 details.

Trustees (if required)

Trustees manage your Trusts for the benefit of the beneficiaries. Usually a couple will be a Trustee of their Spouses Trust. You need at least TWO per trust. You must be able to trust them with your life!!

Trustee 1 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Trustee 1 details.

Trustee 1 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Trustee 1 details.

Trustee 2 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Trustee 2 details.

Trustee 2 Full Name, Address Street, Area, Town, County, PostCode, Email

Form for Trustee 2 details.

Main Beneficiaries

These are the people who will benefit from your Will. 1st line are the first to benefit, then 2nd line benefits when 1st is deceased or as the Will stipulates. Usually, husband to wife or wife to husband, then to the children. It can be whatever you want. It is important to state who will get what, for example 100% to my wife, then split equally between children / friends / charity etc etc. Use the info box to detail if you can.

Name, Address Street, Area, Town, County, Postcode

Form for Main Beneficiary 1 details.

Name, Address Street, Area, Town, County, Postcode

Form for Main Beneficiary 1 details.

Name, Address Street, Area, Town, County, Postcode

Form for Main Beneficiary 2 details.

Name, Address Street, Area, Town, County, Postcode

Form for Main Beneficiary 2 details.

Any information you'd like to add? (Continue on Continuation sheet tab below)

Large yellow box for additional information.