



To Help you prepare to plan ahead

i **Personal belongings:**

Your will is where you choose any personal items that you would like to give to the people you care about.

We will need:

1. Details of the gift
2. Their full names, addresses and dates of birth

i **Decide if there are any gifts of money that you would like to give. Again we'll need:**

1. Details of the gift
2. Their full names, addresses and dates of birth

i **Everything else:**

After any gifts made by you, payment of tax, debts and your funeral costs, you need to decide who you would like to receive everything else. This is usually your partner, charity or your children.

i **Replacement wishes:**

With your gifts to your partner or children (or anyone else), you may want to set out who should get their gift if they die before you. For example a gift to a child is often then shared equally between their children (your grandchildren).

i **Charity:**

If any of your gifts above are to go to a charity you will need to double check the name and address (as many charities have similar names).

i **Total value:**

To help us give you the best advice, it is helpful if you can list the main items you own with an approximate value.

i **Guardian for children:**

If you have children under 18 you can decide who you would like to appoint as guardian to look after them if both you and their other parent were to die. This is usually a trusted close relative. You will need to discuss this with them as they would need to have the capability to take on this role.

i **Your funeral wishes:**

You can use your will to give your preference for burial or cremation and any religious requirements. Whilst it does not bind your executors, it highlights the importance of appointing people you trust to carry out your wishes.

i **Legal responsibility for carrying out your will:**

You will need to appoint an executor to administer your will after you've died, this is someone you trust to ensure your wishes are followed. Most people choose two executors. You need reliable people who would work well together and be able to cope with this important legal responsibility. It can be quite a burden, so we would be happy for you to appoint your QualitySolicitors firm to do this for you, perhaps working alongside a trusted friend or relative. We can explain the costs involved – so that you know your affairs are left in a safe pair of hands. If you have anyone in mind, we will need their name and address.

i **Lifetime decisions – your finances, medical treatment and where you live:**

Your will covers your wishes for when you die. However as an optional extra we recommend that as well as your will you also put legal protection in place in case of accident or illness. This is to ensure your wishes are carried out if you were unable to make decisions for yourself whilst still alive. This can cover important decisions about your finances, where you live and your medical treatment. The separate document to your will is known as a 'Lasting Power of Attorney'. In it you get to appoint someone you trust to step in to make those decisions for you. Without it your partner or family do not automatically have the legal power and instead the court steps in. It costs extra now but can save money in the long run. Most people find it important.

Don't worry if you haven't made all of these decisions yet – that's what our service is all about – helping you to understand the options and make the decisions that are right for you.



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