



# WILLS CHECKLIST

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If you would like to make a Will, or to discuss making a Will, it helps to prepare for the discussion. If you complete as much of this Checklist as you can and either send it to us or bring it with you when you come for your appointment, we will be able to assess your circumstances more quickly, avoiding wasted time and perhaps the need for another appointment.

If you can't answer a question or are not sure about the answer, don't worry - we will deal with the question with you when we meet, or please feel free to give us a call. If you run out of space, please continue on a separate sheet of paper, noting the Section and the number of the Question you are answering.

## SECTION A - GENERAL INFORMATION

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### 1. FULL NAME

(Including any middle names, maiden names or former names where applicable).

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### 2. ADDRESS

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### 3. CONTACT DETAILS

(a) Phone Numbers: Home / Work / Mobile

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(b) Email

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### 4. MARITAL STATUS

(I.e. single / engaged / married / widowed / civil partnership).

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### 5. SPOUSE'S OR CIVIL PARTNER'S NAME IF APPLICABLE

(Including any middle names, maiden names or former names where applicable).

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### 6. FATHER'S NAME

Please provide the full name of your father.

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## 7. DETAILS OF ANY CHILDREN

### (a) Please state the full name and date of birth of any children

(Including any middle names, maiden names or former names where applicable).

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### (b) Were the children born within a previous marriage/relationship?

Are they legitimate (i.e. born inside of marriage), illegitimate (i.e. born outside of marriage)?

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### (c) Do you have any step-children or children other than those in (a) above who are dependent upon you?

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### (d) Have you ever adopted a child or given up a child for adoption?

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## 8. EXISTING WILLS

Please provide details of any existing wills that you may have in any jurisdiction.

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## 9. TYPE OF WILL REQUIRED

Please state whether you would like to make a Will dealing with your Real Estate only, Personal Estate only, or both.

Real Estate is houses and/or land. Personal Estate is everything which is not house and/or land, i.e. contents of bank accounts, furniture, jewellery, personal possessions etc.

If you would like to make provision for both your Real Estate and Personal Estate please note that it is now possible to make a single, combined Will.

Please state below whether you would prefer to make a combined Will, or two separate Wills relating to Realty and Personalty. In doing so please consider that if a combined Will is made, details relating to your Personal Estate as well as Real Estate will become a public record on your death.

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If you wish to make a combined Will, or separate Wills, dealing with both your Real Estate and Personal Estate please complete all Sections.

If you wish to make a will dealing with your Guernsey Real Estate only, please complete Sections A and B.

If you wish to make a will dealing with your Personal Estate only, please complete Sections A, D and E.



## SECTION B - GUERNSEY REAL ESTATE

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If you own Real Estate in Guernsey, it is essential to have a Will in place that covers houses and/or land situate in Guernsey.

### 1. DETAILS OF REAL ESTATE IN GUERNSEY

Please state how this property is owned, e.g. solely or jointly; in survivorship or undivided shares.

Please attach a copy of your title deeds.

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### 2. BENEFICIARIES

**(a) Who do you want to inherit your Real Estate and, if more than one person, in what shares? (i.e. equally, percentages etc).**

Please provide full names and addresses.

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**(b) If the person(s) named above dies before you, to whom do you wish to leave their shares to?**

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## SECTION C - REAL ESTATE SITUATED OUTSIDE OF GUERNSEY

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### 1. DETAILS OF REAL ESTATE OUTSIDE OF GUERNSEY

Please provide a brief description including the ownership of any property you own which is situated outside of Guernsey.

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### 2. HAVE YOU PREVIOUSLY MADE A WILL DISPOSING OF THIS PROPERTY?

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### 3. BENEFICIARIES

**(a) Please state who you would like to inherit your Real Estate including their names and addresses.**

If more than one person, in what proportion (i.e. equal shares, percentage shares etc.), or in what manner (e.g. life interest).

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**(b) If the person(s) named above dies before you, to whom do you wish to leave their shares to?**

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## SECTION D - PERSONAL ESTATE

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### 1. DOMICILE

Please state whether you were born in Guernsey and if not where you were born and how long you have lived in Guernsey.

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Please also state whether you intend to remain in Guernsey permanently.

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### 2. EXECUTOR

Please state who you would like to be the Executor of your Will, including their full name (including any middle names, maiden names or former names where applicable) and address. Collas Crill can act in this capacity should you wish.

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### 3. SECOND CHOICE OF EXECUTOR

Please state your second choice of Executor in the case that your first choice cannot act, including their full name (including any middle names, maiden names or former names where applicable) and address.

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### 4. SPECIFIC GIFTS

If you would like to make any specific bequests, (for example: of sums of money or specific items), please provide a full description of the items in question and state the full names and addresses of these beneficiaries.

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### 5. THE RESIDUE OF YOUR ESTATE

(i.e. what is left after any specific gifts)

#### (a) Please state who should be the principal beneficiaries of the remainder of your estate.

Please provide full names (including middle, former and maiden names) and addresses. If more than one beneficiary please state the shares in percentages or fractions which each person is to receive. If you wish to include charitable beneficiaries, please provide details including the registration number if known.

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#### (b) If the person(s) named at (a) above dies before you, to whom do you wish to leave their share to?

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**6. WILL TRUST**

Please state whether a Will trust is required for minor beneficiaries, whereby the executor will hold the beneficiary's share on trust until he or she attains a certain age or under certain circumstances. If such a trust is required please state at what age you would like the minor beneficiaries to inherit the capital. If you would like to include a trust for any other beneficiary please outline the details below, i.e. what you wish to achieve and why.

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**7. GUARDIAN OF MINOR**

Please state whether a Testamentary Guardian should be appointed under your Will in relation to any minor children existing at the time of your death. If a guardian is required please state who you would like this to be, including their full name and address, and who your second choice would be in the case that your first choice is unable to act.

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**8. INSURANCE POLICIES/DEATH IN SERVICE/PRIVATE PENSIONS**

**(a) Do you have any insurance policies, Death in Service benefits or private pensions and if so do you have a letter of wishes to cover these?**

If not these assets will form part of your estate and you can indicate who you would like to be the beneficiary of the policy. If you do not specify a beneficiary, these assets will form part of the residue of your estate.

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**(b) Mortgage protection insurance**

Do you you have insurance to cover your mortgage? If so you can direct in your will that your executor should apply the proceeds of the policy towards the repayment of your mortgage. This is of particular relevance if the beneficiaries of your immovable estate are different to the beneficiaries of your movable estate.

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**9. ASSETS**

**(a) Please provide a list of your personal assets**

E.g. bank accounts, stocks, shares etc, and state whether these are owned by you solely or in joint names.

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## SECTION E - OTHER

### 1. PETS

Please detail any requests relating to pets which may be alive at the time of your death.

### 2. BURIAL OR CREMATION

Please state whether you would like to be buried or cremated and any requests relating to your funeral.

### 3. ORGAN DONATION

Please indicate your preference by ticking the appropriate box below;

I wish to OPT-OUT      I wish to OPT-IN

Failure to provide us with your preference will automatically opt you IN to Organ Donation following the introduction of Guernsey's Human Tissue and Transplantation (Bailiwick of Guernsey) Legislation. Whilst the date of the commencement of this law is not yet know, once this law is brought into force it will be advisable to confirm your preference for donation (opt-in) or no donation (opt-out) to be specified under your Will.

It is also important that once you make a decision about organ and tissue donation – to be a donor, or not to donate – you record this on the National Register of Organ Donors ([www.organdonation.nhs.uk/](http://www.organdonation.nhs.uk/)). It is also advisable that you notify family members and also your GP of your wishes.

### 4. ANY OTHER COMMENTS

#### FOR MORE INFORMATION PLEASE CONTACT:



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