



## CLIENT'S INITIAL INSTRUCTION FORM

Ref:

*If you would like us to act for you please complete this form to provide the information we will need to begin acting on your instructions. We will ask you for more detailed information with our next letter. Where boxes appear, simply tick the relevant option.*

### 1. General Details

**First client:**

Full Name (inc middle names):			Mr/Mrs/Miss/Ms
Address (inc post code):			
E-mail address		Home Tel	Mobile Tel
Date of Birth		National Insurance No	
Occupation			
Relationship to 2 <sup>nd</sup> Client (please state if business partner / married / divorced / relative)			

**Second client:**

Full Name (inc middle names):			Mr/Mrs/Miss/Ms
Address (inc post code):			
E-mail address		Home Tel	Mobile Tel
Date of Birth		National Insurance No	
Occupation			
Relationship to 1st Client (please state if business partner / married / divorced / relative)			

Married?	YES/NO	Do you have a partner?	YES/NO
Are you both making Wills?	YES/NO	Do you have previous Wills? If so where are they held?	YES/NO

Do you have property outside the United Kingdom?	YES/NO	If Yes, please give details?	
Do you own your own Property?	YES/NO	If yes, is this held	Sole Name/ Joint Name/ tenants in Common <i>(if necessary we can this for you please let you know)</i>
Approximate value of your Estate? <i>(When considering this you should take into account the value of your property, any savings, shares, pensions, investments etc..)</i>	£		
If your Estate is over the current Inheritance Tax limit of £325,000.00 you may require tax planning advice	Please confirm YES/NO		
Are there any special circumstances that need to be taken into consideration? i.e. do you intend to get married? Are there children from previous marriages etc?			

## EXECUTORS

**Your Executors will be responsible for dealing with your estate upon your death. You should choose someone that you trust who will be able to deal with your affairs on your behalf. Married couples usually appoint each other. Beneficiaries can also be Executors.**

**It is up to you how many Executors you wish to appoint but we would recommend no more than two or three. You should also consider appointing substitute Executors in the event that your chosen Executor is unable /unwilling to act.**

Married Couples only – appoint each other as Executors?	YES/NO
Full Name of Executor	
Address	
Relationship to you i.e. husband/brother etc	
Full Name of Executor	
Address	
Relationship to you i.e. wife/sister etc	
Full Name of Substitute Executor	
Address	
Relationship to you i.e. son/daughter etc	
Full Name of Substitute Executor	
Address	
Relationship to you i.e. son/daughter etc	

### Funeral Directions

You do not have to include such directions if you do not wish to do so.				
Burial		Cremation		Other
Any further specific details				

## GUARDIANSHIP

If you have children who are under the age of 16 years then you should consider appointing Guardians for them. A guardian should be someone that you would want to take care of your child/children in the event that both of the child's parents are unable to.

Full name Guardian (s)	
Address	
Relationship to you	

## GIFTS

There may be specific items or sums of money that you like to leave directly to certain people upon your death. If so please give details below

Couples – please note that such items would pass on the first death therefore would not pass on to the survivor. Would you like such items to pass only on the death of both of you?	YES/NO
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### MONEY GIFTS

Amount	£	To be given to?	
Relationship		Free of Tax	YES/NO
Conditions i.e subject to person reaching 18 years			
Gift to pass to Substitute?			

Amount	£	To be given to?	
Relationship		Free of Tax	YES/NO
Conditions i.e subject to person reaching 18 years			
Gift to pass to Substitute?			

<b>SPECIFIC PROPERTY i.e Jewellery, ornaments, paintings etc (please continue on a separate sheet if necessary)</b>			YES/NO
Description			
To		Relationship	
Description			
To		Relationship	

## RESIDUE

All of your assets, not including any specific gifts that you have made are collectively known as residue.

COUPLES					
All to each other?	YES/NO	Then to your children?	YES/NO	Age they must reach before inheriting?	NONE 18/21/25
Then to any grandchildren?	YES/NO		Age they must reach before inheriting?		NONE 18/21/25
OTHER					
Full name of beneficiary residue					
Address			Relationship		
Full name of beneficiary residue					
Address			Relationship		
Residue to pass in equal shares/percentage shares please specify					

### Substitute Beneficiaries if above predecease

Full name of beneficiary residue					
Address			Relationship		
Full name of beneficiary residue					
Address			Relationship		
Any other specific instructions? Please state anything further that you think should be considered when making your Will.					

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**How did you hear about andrews ritson?**

Existing client		Internet		Friends/Family recommendation	
Advertising		Please state			
Referrer		Please name			

**Keeping in touch**

We would like to keep in contact with you, at your convenience. Please confirm how best we can keep in regular contact with you from the options below:

Prefer Email contact	Preferred email address:	Mornings/afternoons
Prefer Phone contact	Preferred number:	Mornings/afternoons

<b><i>If you would like us to contact you on a specific day and time each week by phone please give us the details</i></b>		
<b><i>Day</i></b>	<b><i>Time</i></b>	<b><i>Preferred Phone number</i></b>

**If you have planned any holidays which may affect your availability to sign documents please notify us as soon as possible to avoid any undue delays.**

**I/We wish you to act for me/us in connection with the transaction(s) outlined above, subject to your terms and on the basis of the fee estimate you have provided with this form.**

Client 1 Name:..... Signature .....

Client 2 Name:..... Signature .....

