



WRIGHT + Co. - WILLS SERVICE FORM

To enable us to draw up your Will, please complete all of the information requested.

(PLEASE NOTE - THIS IS NOT A WILL)

FULL NAME:

ADDRESS:

TELEPHONE NUMBER:
MOBILE NUMBER:
E-MAIL ADDRESS:

**1 PLEASE DETAIL FULL NAME(S) AND ADDRESSES OF YOUR EXECUTORS
(We recommend nominating Donald James Wright and a friend or relative)**

Executor details	Executor details

**2 PLEASE DETAIL NAME(S) AND ADDRESSES OF MAIN BENEFICIARIES
(i.e. those you wish to receive the main part of your estate, after distribution of specific requests e.g. "I leave the residue to my wife and children")**

BENEFICIARY	ADDRESS
BENEFICIARY	ADDRESS
BENEFICIARY	ADDRESS

3 LIST SPECIFIC BEQUESTS, IF ANY, YOU WISH TO MAKE
(e.g. my new blue Corsa car to Mr Brown, 3 White Street, Orange Town; gift to a charity; my three string pearl necklace to Mrs Black, 5 Green Crescent, Yellow Town)

BEQUEST	TO WHOM

4 FOR ANY CHILDREN UNDER THE AGE OF 18 YEARS, PLEASE SUPPLY THE FOLLOWING DETAILS

NAME	ADDRESS	PROPOSED GUARDIAN
NAME	ADDRESS	PROPOSED GUARDIAN

To help us give you the best advice, can you please complete the following questions:

5 DO YOU HAVE ANY DEATH IN SERVICE BENEFITS?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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6 DO YOU REQUIRE ANY INHERITANCE TAX PLANNING OR ANY OTHER FINANCIAL ADVICE? (See website: - www.inheritancetaxuk.com)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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7 PLEASE ADVISE US OF WHERE YOU WOULD LIKE YOUR WILL TO BE KEPT

RETAIN WILL AT YOUR OFFICE AND SEND ME A COPY	<input type="checkbox"/>
PLEASE SEND ME THE ORIGINAL WILL	<input type="checkbox"/>

Once you have completed this form, please send it to the address detailed below.

We will send you out a quote for preparing your Will and enclose a draft Will for you to approve.

Wright + Co, 5e Giles Street, Edinburgh, EH6 6DJ
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Fax: 0131 467 3344
Email: info@propertywright.com