

BERKELEY SOLICITORS

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CLIENT INSTRUCTIONS CHECK LIST

CLIENT

1. Your Details

Full first names.....
Surname

Address

.....

Postcode

Tel No

DOB

Occupation.....

2. Husband/Wife/Partner

Full first names
.....

Surname.....

3. Marriage/Partnership Details

- (a) Not married to your partner
- (b) Intending to marry/re-marry in the near future
- (c) Married before Yes/No
- (d) Divorced Yes/No

If 'Yes' give date

4. Children (including children from a previous marriage or relationship)

- (a) Name
- DOB
- Address
-
- (b) Name
- DOB
- Address
-
- (c) Name
- DOB
- Address
-
- (d) Name
- DOB
- Address
-

5. Children of husband/wife/partner's previous marriages or relationships

(a) Name

DOB

Address

.....

(b) Name

DOB

Address

.....

(c) Name

DOB

Address

.....

HOME AND OTHER ASSETS

6. HOME DETAILS

(a) Owned:

(i) in sole name? Yes/No

(ii) in joint names with husband/
wife/partner? Yes/No

(iii) in the name of husband/wife/
partner alone? Yes/No

(b) Rented? Yes/No

7. BUSINESS DETAILS

If relevant state type of business

.....

.....

Company Partnership

In Sole Name (Please tick box)

8. MAIN ASSETS (with approximate values)

.....

.....

.....

.....

.....

.....

9. JOINT ASSETS (with approximate values)

.....

.....

.....

.....

.....

.....

.....

10. ASSETS ABROAD (with approximate values)

.....

.....

.....

.....

.....

.....

.....

11. FUNERAL

Buried Cremated No preference

(Please tick box)

Burial plot etc. reserved Yes/No

12. EXECUTORS

Solicitor Yes/No

Other:-

(i) Name

Address

.....

.....

(ii) Name

Address

.....

.....

(iii) Name

Address

.....

.....

13. GUARDIANS

(i) Name

Address

.....

.....

.....

(ii) Name

Address.....

.....

.....

.....

14. CASH GIFTS

(i) Name

Address.....

.....

.....

Amount £.....

(ii) Name

Address

.....

.....

Amount £.....

(iii) Name

Address

.....

.....

Amount £.....

(iv) Name

Address.....

.....

.....

Amount £

(v) Name

Address

.....

.....

Amount £.....

15. GIFTS OF ARTICLES

(i) Name

Address.....

.....

.....

Article

(ii) Name

Address

.....

.....

Article

(iii) Name

Address

.....

.....

Article

(iv) Name

Address

.....

.....

Article

(v) Name

Address

.....

.....

Article

16. THE RESIDUE

(i) Everything to husband/wife/partner named outright. If he/she has died then to my children.

(ii) Everything to my children equally.

(iii) To husband/wife/partner above, but if he/she has died before me to person(s)/organisation(s) named below. If not in equal shares, then show the share each is to take.

(a) Name

Share

(b) Name

Share

(c) Name

Share

(d) Name

Share

(e) Name

Share

(iv) Are grandchildren to take pre-deceased child's share. Yes/No

17. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE

Set out who is to receive the residue and in what shares.

(i) Name

Address.....

.....

.....

Share

(ii) Name

Address

.....

.....

Share

(iii) Name

Address

.....

.....

Share

(iv) Name

Address

.....

.....

Share

(v) Name

Address

.....

.....

Share

Who is to benefit if the recipient pre-deceases you.

(i) Name

Address

.....

.....

Share

(ii) Name

Address

.....

.....

Share

(iii) Name

Address

.....

.....

Share

(iv) Name

Address

.....

.....

Share

(v) Name

Address

.....

.....

Share