

The background of the entire page is a scenic landscape. In the foreground, a wooden boardwalk with a railing leads from the bottom left towards a lake. The lake is surrounded by mountains, some with snow, and dense evergreen forests. The sky is a soft, hazy grey.

tandem.
planning your adventure

Will and Estate Planning Service

Fact finding

The right money – to the right people – at the right time

Some information we will need

You want to create the most robust, relevant will to secure your goals and wishes. To enable us to help you achieve that, please can you provide the following information:

Beneficiary Information

Please provide the names and addresses of people you wish to leave your estate to (e.g. children, spouse).

Description of gift	Name of beneficiary

Executor/Trustee Information

Please provide the names and information of people you wish to distribute your estate upon your death.

Executor 1 Name: _____ Address: _____
Executor 2 Name: _____ Address: _____
Executor 2 Name: _____ Address: _____

Guardian Information

If you have children under 18 and wish to name a guardian(s), please provide their details here.

Guardian 1 Name: _____ Address: _____
Guardian 2 Name: _____ Address: _____

Assets

Please list the possessions, property and valuables that you own - anything you can think of which forms part of your estate. (E.g. House, car, pension). Separate each item with a comma.

Debts

Please list any outstanding debts that you owe (e.g. car finance, mortgage). Separate each item with a comma.

Previous Gifts

Please list any previous gifts you have made in the last 7 years. Do not worry about gifts to your partner, or small gifts like birthday and Christmas presents (provided these total no more than £3000 each year). Separate items with a comma.

Funeral Wishes

Please state any funeral wishes and arrangements here. For instance, if you wish to be cremated or buried.

Disclaimer:

This document is designed only for use by, and is directed only at, persons in England and Wales. Scotland is a different legal jurisdiction not covered by Tandem. This document does not constitute legal, tax or financial advice. It is merely an indicator and a guide of the services that Tandem offer.

If you have any questions relating specifically to your own circumstances, please contact us so that we may discuss these with you.

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