

# MAKING YOUR WILL

**WHY | WHEN | HOW?**

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We all know we should make a Will – but why? When is the right time to make a Will?

What should it include and how do you put it in place?

Pardoes Solicitors provide information and guidance to help you make your Will, safeguarding your assets and providing for those you love.

**NOTE:** When making a Will, you should also consider completing a **Lasting Power of Attorney (LPA)** to appoint one or more people of your choice to look after your property and financial affairs, and your health and welfare, if you became unable to do so because of mental or physical impairment.

If you would like further information about Wills or LPAs, please contact our team at your local Pardoes office.

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## Why do I need to make a Will?

A Will is a legal document that specifies your wishes about what happens when you die. It is likely to include the following:

- Who you would like to appoint as your 'Executor' – the person or people in charge of organising your estate and following the instructions you leave in your Will. They will also become your Trustee to look after any Trusts which arise, for instance for children who are not old enough to inherit.
- Who you would like to have your property, possessions and money.
- Who you would like to take care of your children and act as their 'guardian' if you should die before they reach the age of 18.
- Specific directions and wishes for your funeral arrangements.

A Will makes it much easier for your family or friends to ensure your wishes are carried out. It can also reduce the amount of Inheritance Tax that might be due. If you do not have a Will, you die intestate and law dictates how your estate is passed on, which might not be in line with your wishes. These rules are out of date and do not cater for modern families, for example cohabittees and stepchildren are not recognised under these rules and will not inherit.

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## When should I make or review my Will?

When you're young, it's natural not to think too much about what happens when you die. However, making a Will isn't something you should put off and can be done from the age of 18 (younger if you are a service man or woman on active duty). A good time to make or review your Will might be when:

- A loved one or beneficiary has died
- You encounter financial changes, such as receiving an inheritance
- You get married or enter into a civil partnership.
- You are getting divorced or separated from your partner.
- You are purchasing your first home, moving house or buying property abroad.
- You have children and want to consider guardianship provisions.
- Your children are getting married, divorced or having their own children.
- You wish to change your Executors.
- You have concerns about potential care home fees in the future.
- You are worried about family disputes

In order to create your Will, you need to have sufficient capacity. Many people leave this until it is too late leaving their loved ones to face the difficulties that come with having to deal with the intestacy rules or an out of date Will.

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## How do I go about it?

Making a Will does not need to be complicated or time-consuming. Follow the steps below and we'll soon have everything in place.

- Get in touch with our specialist Private Client team and we will arrange a meeting to discuss your individual needs.
- At the meeting, we will provide you with specialist and personalised advice, take you through issues you might wish to consider and record any specific instructions you have decided upon.
- Before proceeding, we will provide you with a quote without obligation for your approval.
- On quote approval, we will send you a draft Will for you to review and check that all details are correct.
- Once you are happy with the content of the Will, we ask you to sign it in the presence of witnesses that we will provide.
- We will send you a copy of your Will for your records and store the original for safekeeping.

“Your professionalism, your ability to be reassuring and your general good humour made the whole process much less painful than it might otherwise have been... I am very grateful.”

**Pardoes**  
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### **Free Legal Guidance**

If we can help you with a legal question, why not book onto one of our free Legal Helplines? We hold the Helpline every Monday between 4-6pm giving you expert legal advice without obligation. Visit us at [pardoes.co.uk](http://pardoes.co.uk) or call your local Pardoes office for more information.

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