

This pack is designed to explain why making a will is important, and to help you think about making a will. It has been prepared with the help of the Society's solicitors, but we must point out that it provides only brief and general information about the law relating to wills and the administration of estates in England and Wales, and UK Inheritance tax. The law is similar (in principle) in other UK legal jurisdictions, but does vary widely internationally.

### ***This information pack contains***

#### **1. Understanding more about wills**

- an explanation of some of the legal terminology you might come across.

#### **2. Questionnaire**

A solicitor will ask you for certain information before he/she can prepare your will. This three part questionnaire helps you get the information together in advance.

Part A – the *essential* information you will need to give to your solicitor.

Part B – some questions about your *finances*. You *don't* have to give this to your solicitor, but you may like to use it to decide who to leave your wealth to. Your solicitor may ask for some financial information to assess whether or not you need tax advice. It is also helps see if your spouse or children are adequately provided for.

Part C – *What you want your will to achieve* i.e. who to leave your assets to. Your solicitor will ask you about this, so its a good idea to have thought it through in advance.

*If you don't find the questionnaire helpful or cannot answer some of the questions, don't worry. Your solicitor will guide you through the information needed.*

#### **3. Please remember ICS in your will**

If (once you have made proper provision for your family) you wish to leave ICS some money when you die, this sheet contains important information for your solicitor.

### ***Finally***

If you don't have a solicitor, how do you go about finding one? You might try

- asking a friend or relative if they can recommend one, or
- in England and Wales check the phone book for the name of the city or county's local Law Society. It may hold a list of solicitors' firms and which particular areas of law they specialise in. You need to find a solicitor or firm who specialises in *Wills and Probate*.

- If you approach a solicitor, ask them if they or someone in their firm specialises in *Wills and Probate*.
- Explain that you want to make a will (and if you are married whether or not your spouse does also) and ask how much they will charge. Check whether or not what the price quoted includes VAT, and whether it's a fixed fee or depends on how much time they will spend on the job.
- Don't be afraid to get two or three quotes from different firms.

*Whilst every effort has been made to ensure the accuracy of the information contained herein, it is no substitute for professional advice from appropriately qualified and experienced legal practitioners in the appropriate jurisdiction(s).*

**Please make sure you get professional advice!**

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