

• WILL CHECKLIST

If you would like to make a Will, or to discuss making a Will, it helps to prepare for the discussion. If you complete as much of this Checklist as you can and either send it to us or bring it with you when you come for your appointment, your advocate will be able to assess your circumstances more quickly, avoiding wasted time and perhaps the need for another appointment.

If you can't answer a question or are not sure about the answer, don't worry - your advocate will deal with the question with you when you meet. If you run out of space, please continue on a separate sheet of paper, noting the Section and the number of the Question you are answering.

SECTION A - GENERAL INFORMATION

1. Full name
(including any middle names, maiden names or former names where applicable).

2. Address

3. Telephone Numbers: home / work / mobile

4. Email

5. Marital Status
i.e. single / engaged / married / widowed.

6. Spouse's Name if Applicable
(Including any middle names, maiden names or former names where applicable).

7. Details of Children of the Current Marriage/Relationship
Please include full name, date of birth and date of adoption (if applicable).

8. Details of any other Children

Please state the full name and date of birth of any children (including any middle names, maiden names or former names where applicable).

Were the children born within a previous marriage/relationship? Are they legitimate (i.e. born inside of marriage), illegitimate (i.e. born outside of marriage) or step-children.

9. Type of Will Required

Please state whether you would like to make a Will dealing with your Real Estate only, Personal Estate only, or both.

IF YOU WISH TO MAKE WILLS, DEALING WITH BOTH YOUR REAL AND PERSONAL ESTATE PLEASE COMPLETE BOTH SECTIONS B AND C BELOW.

IF YOU WISH TO MAKE A WILL DEALING WITH YOUR REAL ESTATE ONLY, PLEASE COMPLETE SECTION B BELOW ONLY.

IF YOU WISH TO MAKE A WILL DEALING WITH YOUR PERSONAL ESTATE ONLY, PLEASE COMPLETE SECTION C BELOW ONLY.

PLEASE NOTE - SECTIONS A AND D MUST BE COMPLETED IN EITHER CASE.

SECTION B - JERSEY REAL ESTATE**1. Details of Real Estate in Jersey**

Please state how this property is owned, e.g. solely or jointly; as joint tenants or as tenants in common.

Please state who you would like to inherit your Real Estate including their names and addresses. If more than one person, in what proportion (i.e. equal shares, percentage shares etc), or in what manner (e.g. life interest).

If the person(s) named above pre-deceases you, to whom do you wish to leave their shares to?

2. Details of Real Estate outside of Jersey

Please provide a brief description including the ownership of any property you own which is situated outside of Jersey.

Have you have previously made a Will disposing of this property?

SECTION C - PERSONAL ESTATE**1. Domicile**

Please state whether you were born in Jersey and if not where were you born and how long you have lived in Jersey?

Please also state whether you intend to remain in Jersey permanently.

2. Executor

Please state who you would like to be the Executor of your Will, including their full name (including any middle names, maiden names or former names where applicable) and address. Collas Crill Executors Limited can act as Executor.

3. Second Choice of Executor

Please state your second choice of Executor in the case that your first choice cannot act, including their full name (including any middle names, maiden names or former names where applicable) and address.

4. Specific Gifts

If you would like to make any specific bequests, (for example: of sums of money or specific items), please provide a full description of the items in question and state the full names and addresses of these beneficiaries.

5. Beneficiaries

Please state who should be the principal beneficiaries of the remainder of your estate. If more than one beneficiary please state the full names and addresses of these beneficiaries. If more than one beneficiary please state the shares in percentages or fractions. If charitable beneficiaries, please provide details including the registration number.

If the persons(s) named above pre-decease you, to whom do you wish to leave their share to?

6. Will Trust

Please state whether a Will trust is required, whereby the executor will hold the beneficiary's share on trust until he or she attains a certain age or under certain circumstances. If such a trust is required please state at what age you would like the beneficiaries to inherit the capital.

7. Tuteur or Tutrice (Guardian) of Minor

Please state whether a Guardian should be appointed in relation to any minor children existing at the time of your death. If a Guardian is required please state who you would like this to be, including their full name and address.

8. Members of the Tutelle

Under Jersey law six additional individuals will need to be appointed to the tutelle as well as the Guardian. Please state who you would like these to be, including their full names and addresses

9. Assets

Please provide a list of your personal assets, e.g. bank accounts, stocks, shares etc, and state whether these are owned by you solely or in joint names.

SECTION D - OTHER

1. Pets

Please detail any requests relating to pets which may be alive at the time of your death.

2. Burial or Cremation

Please state whether you would like to be buried or cremated and any requests relating to your funeral.

3. Any other comments



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