

WHAT HAPPENS IF YOU DIE WITHOUT MAKING A WILL?



Notes:
 1. children includes adopted and illegitimate children but excludes stepchildren
 2. children receive their inheritance on reaching 18, or earlier marriage
 3. descendants share equally the parts that the deceased parents would have taken
 4. same principles apply to civil partners

**Making a Will is the only way to make sure that your estate passes to the people you want it to.
Don't delay, make a Will today!**



PRIVATE CLIENT


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INHERITANCE PLANNING HEALTH CHECK

Are your personal matters up to date?

Inheritance claims are becoming ever more commonplace in today's society. Are your personal matters up to date? Please complete the short health check below to see how out of date your legal matters are.

Yes No

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you understand how your estate would be divided under the Intestacy Rules? * |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have a Will, have you reviewed your Will in the last five years? ** |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you aware of all the latest inheritance tax reliefs available? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you considered gifting assets to children/grandchildren? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a plan in place to protect agricultural assets/business assets? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you know that marriage revokes a Will (unless made in contemplation of marriage)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you considering marriage and wish to protect your assets? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you need help finding your way through the turmoil of a marriage breakdown? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you considered what would happen if you lost mental capacity to deal with your affairs? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you require assistance with the administration of an estate? *** |

* Please see our intestacy chart overleaf. Would the law distribute your estate to the people you want it to go to?

** If you have an existing Will, we are happy to provide a free Will review for you

*** We are happy to assist you in obtaining a Grant of Representation and beyond

If you have answered 'yes' to the above and would like any advice in these areas, please contact:

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