

Single Will Instruction Form

Please read the associated Will guidance notes before completing this form. This form can be used if you wish to create a single Will i.e. for you solely. If you require any assistance when completing this form please call our Customer Care Team on 0808 281 1545. Please complete this form using black ink in block capitals.

1. Personal details

Please provide your current address. **If you are moving home in the near future you will NOT need to update your Will** unless you have specifically gifted it to someone other than who is receiving your residuary estate or you have requested a trust.

| | |
|----------------------------------|------------------|
| Title | Surname |
| Full Forename(s) | |
| Any other names legally known by | |
| Address | |
| Postcode | |
| Date of Birth | Place of Birth |
| Home Tel No.† | Daytime Tel No.† |
| Email Address | |

†Please complete so Redstone Wills can contact you to prepare your Will.

- a:** Are you male or female? Male Female
- b:** Do you have any health issues or mental impairments which may affect your capacity to make a Will? YES NO
- c:** If yes please provide further details below.

- d:** Do you consider yourself to be domiciled in England or Wales? YES NO
- e:** If you consider yourself to be permanently resident elsewhere, please state which country:

- f:** Marital status single married registered civil partnership divorced widowed
(You can tick more than 1 option)

- g:** Are you intending to be married in the near future? YES NO
- h:** Are you intending to enter into a registered civil partnership in the near future? YES NO
- i:** Do you have any children from any marriages? YES NO
- j:** Do you have any children from any unmarried relationships? YES NO

1. Personal details - continued

k: Do you have a previous Will? YES NO

l: If yes please provide the date of that Will and the reason for creating a new Will.

List below **ALL CHILDREN**, including all those from previous marriage/relationships. Please include their dates of birth (or ages).

| Full Name and Address | D.O.B/Age | Gender |
|-----------------------|-----------|---|
| | | M <input type="checkbox"/> F <input type="checkbox"/> |
| | | M <input type="checkbox"/> F <input type="checkbox"/> |
| | | M <input type="checkbox"/> F <input type="checkbox"/> |
| | | M <input type="checkbox"/> F <input type="checkbox"/> |
| | | M <input type="checkbox"/> F <input type="checkbox"/> |
| | | M <input type="checkbox"/> F <input type="checkbox"/> |

2. About Your Estate

Assets

Please list your current approximate sole assets or your share of jointly owned assets and approximate values for each item. Please note this is for information purposes only and items contained within this list will not be specially gifted in sections 7 and 8.

Except for property held as Tenants-in-Common, in the event assets are held jointly with another person(s), the ownership (and value) will revert automatically to the survivor(s) irrespective of your Will.

This information is not used to provide inheritance tax advice. If you have inheritance tax liability we recommend you seek further independent advice.

| Assets | | Total (£) |
|------------------------------|---|-----------|
| Principal Place of Residence | | |
| | Sole owner <input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenant in Common <input type="checkbox"/> Unknown <input type="checkbox"/> | |
| Other Property (E&W) | | |
| | Sole owner <input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenant in Common <input type="checkbox"/> Unknown <input type="checkbox"/> | |
| Car(s) | | |
| Cash in the bank | | |
| Shares | | |
| Unit trusts | | |
| ISA | | |
| Pension | | |
| Bonds | | |
| Jewellery | | |
| Furniture | | |
| Life Insurance | | |
| Your business | | |
| Death in service | | |
| Other items | | |
| Total | | |

If you are unsure of the ownership of your property, please call our team to arrange a Land Registry check for a fee of £12.

Debts

Please list your current Debts and approximate values for each item.

| Debts | Total (£) |
|-------------------------|-----------|
| Mortgage | |
| Bank loans | |
| Credit cards | |
| Hire purchase agreement | |
| Other debts | |
| Total | |

You may meet the criteria to talk to a Skipton Financial Advisor – Please tick here if you would like Skipton Building Society to contact you. Further information can be found in the Skipton Financial Advice brochure.

3. Foreign Assets

a: Do you have any property outside the United Kingdom? YES NO

If 'Yes', please give the following details (i.e. what the asset is and in what country it is held):

b: Have you made a Will in the particular country or countries? YES NO

4. Executors

You must complete this section before submitting the form to us.

Please indicate who you wish to appoint as your Executor(s). Please provide full names and addresses.

See our Appointing your Executor guide to find out some of the duties of an Executor.

Probate can be very complex and time consuming, so it is usually best left to an expert. This way you can ensure that everything is carried out correctly and no mistakes are made. Redstone Wills Limited, a subsidiary of Skipton Building Society, can offer a specialised and unbiased service by acting as your Executor.

Please note if you appoint Redstone Wills Limited their fees will be their standard rate according to their published terms and conditions at the date of your death, currently 1.99% plus VAT of your Estate.

Executors must be over 18 years of age.

Please indicate who you wish to appoint as your Executor(s):

Redstone Wills Solely

Redstone Wills Jointly with person(s) named below

Other (please provide details below)

1. Full Name

Full Postal Address

To act solely or jointly

Relationship to you

2. Full Name

Full Postal Address

To act solely or jointly

Relationship to you

Reserve Executor(s)

If you have selected Other when appointing your Executor(s) we recommend you also appoint a reserve Executor to act if the above are unable to act as your Executor when required.

4. Executors - continued

Please indicate your reserve Executor(s):

- Redstone Wills Solely
- Redstone Wills Jointly with person(s) named below
- Other (please provide details below)

1. Full Name

Full Postal Address

To act solely or jointly

Relationship to you

2. Full Name

Full Postal Address

To act solely or jointly

Relationship to you

5. Funeral Instructions

- a:** Do you wish your body to be: Buried Cremated No Preference
- b:** Have you put in place a provision for your funeral such as a Funeral Plan? YES NO
- If Yes, who provides your Funeral Plan?

If 'Yes', please ensure the instructions provided in this section are the same as those in your Funeral Plan.
If you have any special instructions for your funeral, you can detail these in a separate note which must be kept with your Will.

6. Guardians

If you have any children who are under 18 years of age it is crucial you appoint Guardians to look after them in the event of both parents deaths. **Please place details below.**

Please refer to the Will Guidance Notes before completing this section.

Full Name

Full Postal Address

Postcode

Relationship to you

6. Guardians - continued

Full Name

Full Postal Address

Postcode

Relationship to you

If you name 2 people in this section they will be appointed jointly.

You should not appoint joint guardians that live at separate addresses. Please see below to appoint a reserve choice of guardian.

Reserve Guardians

If both of the above cannot or will not act. It is highly advisable to appoint reserve guardians. **Please place details below.**

Full Name

Full Postal Address

Postcode

Relationship to you

Full Name

Full Postal Address

Postcode

Relationship to you

7. Gifts

You should now consider any specific items free of Inheritance Tax or amounts of money you wish to give as Gifts.

7a. Gift of Chattels

Small personal and household items such as a memento can be left to someone of your choosing in what is called a 'letter of wishes' which is referred to within and accompanies your Will. A 'letter of wishes' is not legally binding but is helpful to guide your executors when distributing personal items. If you would like a letter of wishes please complete this section. A letter of wishes can be made and stored at any time with your Will.

Do you wish to give personal items to be distributed by your Executor according to a list you will prepare?

YES NO

Please note that the personal chattels does not include gifts of money and should not be used for items of high value.

7b. Gift of Property - Land and Buildings

Please only complete this section if you intend to gift your property to a person other than who is to receive your entire estate.

| | |
|----------------------------------|--|
| Recipient | |
| Relationship | |
| Address | |
| Address of property being gifted | |
| Includes household contents | Yes <input type="checkbox"/> No <input type="checkbox"/> |

If this is your main residence should this gift cover any future main residence if you move? Yes No

7c. Other Gifts

Please list below any Gifts you wish to be included in your Will. These gifts will be given free of inheritance tax (IHT) unless you specify otherwise.

This means that any IHT payable will be taken from your residuary estate.

| | |
|-----------------|--------------|
| Recipient Name | Relationship |
| Address | |
| Details of Gift | |

| | |
|-----------------|--------------|
| Recipient Name | Relationship |
| Address | |
| Details of Gift | |

| | |
|-----------------|--------------|
| Recipient Name | Relationship |
| Address | |
| Details of Gift | |

| | |
|-----------------|--------------|
| Recipient Name | Relationship |
| Address | |
| Details of Gift | |

7d. Gifts to Registered Charity

If you would like to leave a gift to a specific charity that you support please provide the details below.

| | |
|-----------------|-----------------------------|
| Charity Name | Charity Registration Number |
| Address | |
| Details of Gift | |

| | |
|-----------------|-----------------------------|
| Charity Name | Charity Registration Number |
| Address | |
| Details of Gift | |

7e. Gift of Pets

Do you have pets? Yes No

If yes, do you need to make special provision for them, if not your Executors will take care of their arrangements.

Do you want to ask someone to take care of your pets? Yes No

Recipient Name

Address

Postcode

Relationship of beneficiary

8. The Residue of Your Estate (basically everything else)

You must complete this section before submitting the form to us.

You must now consider who will receive the 'residue' of your estate, which is what remains after your debts, taxes and any gifts listed on the previous page have been taken out. You can choose your spouse/partner/civil partner, your children, a charity or somebody else.

a: Is the residue of your estate to pass firstly to your spouse/partner/civil partner? Yes No Not applicable

Full Name of spouse/partner/civil partner

Full Postal Address

Postcode

b: If your spouse/partner/civil partner dies before you, or if you are not making provision for them, is the residue then to pass to your children? Yes No

Do you want to make provision for future children? Yes No

Please note that 'children' does not include stepchildren. If you would like to make provision for your stepchildren then please name them in box **e**:

c: Should a child/children pass away before you, is their share to pass to Your surviving children Their children including their future children but not including step children (if none then to surviving children)

d: Do you wish your children to receive equal shares of your estate? Yes No

If you do not wish them to receive equal shares, please state the % share you wish each to receive.

Legally any minors will inherit upon attaining 18 years of age. If you wish to specify a higher age please fill in the box below. Please note if the age selected is above 25 years there may be adverse tax consequences.

Please specify at which age your minor beneficiaries should inherit.

8. The Residue of Your Estate (basically everything else) - continued

| e: | Child's Name | Relationship to you | Relationship to you | Share % |
|----|--------------|--|--|---------|
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |

Only if applicable, please list below the names of any beneficiaries other than your children.

| f: | Beneficiary 1 | Beneficiary 2 |
|---|--|---|
| Full Name | | Full Name |
| Full Postal Address | | Full Postal Address |
| Postcode | | Postcode |
| Relationship you | | Relationship to you |
| Share % | | Share % |
| Is the beneficiary under 18? | Yes <input type="checkbox"/> No <input type="checkbox"/> | Is the beneficiary under 18? |
| | | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| If yes, what age should they inherit? | | If yes, what age should they inherit? |
| Should a beneficiary pass away before, is their share to pass to: | | Should a beneficiary pass away before, is their share to pass to: |
| Their children including future children <input type="checkbox"/> | | Their children including future children <input type="checkbox"/> |
| To the other beneficiaries specified <input type="checkbox"/> | | To the other beneficiaries specified <input type="checkbox"/> |

8. The Residue of Your Estate (basically everything else) - continued

Only if the above fails entirely, who do you wish to be your reserve beneficiaries?

| g: Reserve Beneficiary 1 | | | Reserve Beneficiary 2 | | |
|---|------------------------------|-----------------------------|---|------------------------------|-----------------------------|
| Full Name | | | Full Name | | |
| Full Postal Address | | | Full Postal Address | | |
| Postcode | | | Postcode | | |
| Relationship you | | | Relationship to you | | |
| Share % | | | Share % | | |
| Is the beneficiary under 18? | Yes <input type="checkbox"/> | No <input type="checkbox"/> | Is the beneficiary under 18? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| If yes, what age should they inherit? | | | If yes, what age should they inherit? | | |
| Should a beneficiary pass away before, is their share to pass to: | | | Should a beneficiary pass away before, is their share to pass to: | | |
| Their children including future children <input type="checkbox"/> | | | Their children including future children <input type="checkbox"/> | | |
| To the other beneficiaries specified <input type="checkbox"/> | | | To the other beneficiaries specified <input type="checkbox"/> | | |

It is advisable to appoint reserve beneficiaries.

If you require further space please use the notes section at the end of this form.

9. Exclusions

a: Would you like to deliberately exclude anyone from your Will who may have a possible claim on the estate?

Refer to Will Guidance Notes for who can make a possible claim.

YES NO

Please note that an ex-spouse who has not remarried can make a claim against your estate.

| Name of Person to Exclude | Relationship |
|---------------------------|--------------|
| | |
| | |

Please tell us why you have chosen to exclude the above and distribute your estate as you have.

We recommend that you prepare a separate letter to be stored with your Will detailing the reason why you have made the exclusion(s). We also recommend this letter details the reason why you have chosen to distribute your estate in the manner you have.

10. Life Interest Trust (optional)

Only complete if you require a trust for your property.

A Life Interest Trust allows someone of your choosing known as the Life Tenant to remain living in a share of a property and enjoy the benefits of the property without actually inheriting it. The Life Tenant is responsible for upkeep of the property unless you state otherwise. On the death of the Life Tenant you can choose who inherits the property. The end of the Trust can also be triggered by remarriage, a certain age or time limit.

A Life Interest Trust can therefore be used to ensure your intended beneficiaries receive your property whilst allowing someone else to benefit from its use in their lifetime. If you provide a Life Interest in a property, you need to consider the treatment of furniture/contents. For example, if you gift your entire residue to another person this would include the contents. When granting a Life Interest you may need to change your property ownership from joint tenants to tenants in common.

Key Benefits

- Protection from hostile creditors
- Protection from spouse/partner remarrying

A Life Interest Trust can be included in your Will at a charge of £132.00 including VAT. Please enclose a cheque made payable to Redstone Wills Limited or call our Customer Care Team on 0808 281 1545 to make payment by debit or credit card.

If you do not require a Life Interest Trust you can gift a property in Section 7b of this application or leave it as part of your remaining estate in Section 8.

Is a Life Interest Trust required? Yes No (If no go to page 12)

Please choose how you would like to create your Life Interest Trust:

Right to occupy the property and right to any income generated by the property (e.g. rental income)

Right to occupy the property only

Which property should form part of the Trust?

Any Main Residence owned at death

Specific Property/Properties

Please stipulate specific property address

Please complete the details of your Life Tenant:

1. Full Name

Full Postal Address

Postcode

Relationship to you

Do you wish your household contents (e.g. furniture and appliances) to form part of the Trust?

If you do not want to include household contents then, if you do not specifically gift them, they will form part of The Residue of Your Estate.

When shall the Trust come to an end?

Re-marriage

Death

Other

Please specify

If other please contact Redstone Wills to discuss other options to ensure that we can fulfil these wishes.

Should the Life Tenant have a right to move during the Trust Period? (e.g. if they wished to downsize) Yes No

10. Life Interest Trust (optional) - continued

Please complete the details of the beneficiary of the property on the death of the Life Tenant:

Equally between my children Unequally between children

If you do not wish your children to receive equal shares, please state the % share you wish each to receive.

| Child's Name | Relationship to you | Share % |
|--------------|--|---------|
| | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |
| | Step <input type="checkbox"/> Son <input type="checkbox"/> Daughter <input type="checkbox"/> | |

Should a child/children pass away before you, is their share to pass to

Your surviving children Their children including their future children
but not including step children
(if none then to surviving children)

Please specify at which age your beneficiaries should inherit

Only if applicable, please list below the names of any Beneficiaries other than your children.

| Beneficiary Name & Address | Relationship to you | Share % |
|----------------------------|---------------------|---------|
| | | |
| | | |
| | | |
| | | |

Only if the above fails entirely, who do you wish to be your reserve Beneficiaries?

| Beneficiary Name & Address | Relationship to you | Share % |
|----------------------------|---------------------|---------|
| | | |
| | | |
| | | |
| | | |

10. Life Interest Trust (optional) - continued

Life Interest Trust - Trustees

If you will be creating a Trust on your death you will need to appoint the Trustees who will manage the Trust on your behalf. Redstone Wills Limited can act solely on your behalf. If you are not appointing Redstone Wills Limited you will need to appoint between 2 and 4 Trustees. Please note if you appoint Redstone Wills Limited their fees will be their standard prevailing rate according to their published terms and conditions at the date of your death.

Same as Executor(s) Redstone Wills Limited Other (provide details below)

(You can only choose this box if you have appointed 2 or more Executors acting jointly)

| Other Trustee 1 | Other Trustee 2 |
|---------------------|---------------------|
| Full Name | Full Name |
| Address | Address |
| Relationship to you | Relationship to you |

| Other Trustee 3 | Other Trustee 4 |
|---------------------|---------------------|
| Full Name | Full Name |
| Address | Address |
| Relationship to you | Relationship to you |

Please note that charges at the prevailing rate will apply on death for the Trust to be created as part of your estate administration.

11. Discretionary Will Trust (optional)

General Discretionary Will Trust

A Discretionary Will Trust allows you to leave an inheritance to provide for the potential benefit of a number of people you select (there must be more than one beneficiary), giving the flexibility to allow the income and capital to be distributed by your Trustees in the manner they see fit. This may be useful if you are unsure which persons from your chosen beneficiaries should receive all, or any, of their inheritance. Your Trustees will have the discretion to determine how long the Trust should remain in force and which of the potential beneficiaries will receive funds from the Trust and when. You may leave a letter of wishes to assist your Trustees with making decisions regarding the time and manner of distribution although this is not legally binding.

You can put your whole estate into this Trust however, depending on the amount involved this may incur adverse tax consequences. If you limit your Trust to your available Inheritance Tax nil rate band (NRB) allowance, this will generally simplify the taxation of the Trust. Your Trustees may require specialist tax advice.

Disabled Discretionary Will Trust

A Disabled Discretionary Will Trust allows you to pass assets to a Trust and the Trustees manage the funds for the benefit of a disabled person, such as making sure bills are paid, and that they have spending money from the Trust for clothes, food etc. As the assets in Trust will not be assessed as forming part of the disabled beneficiary's own estate, the discretionary trust arrangement has the advantage that the trust funds should not affect the beneficiary's entitlement to some benefits.

Key Benefits

- Allows assets to be managed for the benefit of vulnerable beneficiaries
- Does not affect the beneficiaries' entitlement to means-tested benefits
- Allows funds to be withheld if a beneficiary is about to become bankrupt or is going through a divorce settlement

11. Discretionary Will Trust (optional) - continued

A Discretionary Will Trust can be included in your Will at a charge of £132.00 including VAT. Please enclose a cheque made payable to Redstone Wills Limited or call our Customer Care Team on 0808 281 1545 to make payment by debit or credit card.

a: Is a Discretionary Will Trust (DWT) required? YES NO (if no, go to page 14)

Please provide your comments why you have selected to create a Discretionary Will Trust.

b: Is the DWT limited to the NRB? Yes No

c: Is one of the Beneficiaries disabled? Yes No

Please detail below the beneficiaries of your Discretionary Will Trust.

Children/Grandchildren

Other (please detail below)

Note: References to Children and Grandchildren mean any and all children who may be living at the time of your death.

DWT Beneficiary 1

Full Name

Address

Relationship to you

DWT Beneficiary 2

Full Name

Address

Relationship to you

DWT Beneficiary 3

Full Name

Address

Relationship to you

11. Discretionary Will Trust (optional) - continued

DWT Trustees

If you will be creating a Trust on your death you will need to appoint the Trustees who will manage the Trust on your behalf. Redstone Wills Limited can act solely on your behalf. If you are not appointing Redstone Wills Limited you will need to appoint between 2 and 4 Trustees. Please note if you appoint Redstone Wills Limited their fees will be their standard rate according to their published terms and conditions at the date of your death.

Same as Executor(s) Redstone Wills Limited Other (provide details below)

(You can only choose this box if you have appointed 2 or more Executors acting jointly)

| Other DWT Trustee 1 |
|---------------------|
| Full Name |
| Address |
| Relationship to you |

| Other DWT Trustee 2 |
|---------------------|
| Full Name |
| Address |
| Relationship to you |

| Other DWT Trustee 3 |
|---------------------|
| Full Name |
| Address |
| Relationship to you |

| Other DWT Trustee 4 |
|---------------------|
| Full Name |
| Address |
| Relationship to you |

Please note that charges at the prevailing rate will apply on death for the Trust to be created as part of your estate administration.

12. Notes

Please use this space to provide us with any special instructions or information you feel may be relevant for the preparation of your Will and continue on a separate sheet if necessary.

13. Proof Of Identification

Please supply **photocopies** of one document from List A and one from List B (see next page) for each Will. If your names differ from that on your identification (e.g. due to marriage, civil partnership or other name change), we will require a copy of the document that confirms the name change (e.g. marriage certificate or change of name deed).

| List A - EVIDENCE OF IDENTITY (PHOTOCOPY) | LIST B - EVIDENCE OF RESIDENCE (PHOTOCOPY) |
|--|---|
| <ul style="list-style-type: none">• Full, valid UK Passport• Full UK Photo Driving Licence <p>The above photographic ID is the most appropriate but if these are not available, we can accept the following:</p> <ul style="list-style-type: none">• Valid HM Forces ID Card• EEA Member State ID Card• Blue Disabled Drivers Pass• Police ID Card• Signed Employer ID Card• UK Firearms Licence/Shotgun Licence• Pensioner's Travel Pass• Current Inland Revenue Tax Notification• Pension Book/Child Benefit Book/Letter from Benefit• Agency confirming the right to benefit• Birth Certificate | <ul style="list-style-type: none">• Utility bill (gas, electricity, water or telephone), no older than three months. We cannot accept mobile phone bills• Council Tax demand for the current year• Mortgage statement for the current year• Bank or Building Society Card statement, no older than three months• Council Rent Book• House or Motor Insurance Certificate <p>We cannot accept mobile phone bills and credit card statements.</p> <p>Please do not send original documents such as passports. If original documents are sent to Redstone Wills we will not accept liability for any damage or loss incurred.</p> |

14. Additional Copies

We can provide you with additional copies of your Will which you may wish to pass to your executor or family members. Additional copies are charged at £12 each including VAT.

I would like copy (copies) of my Will and I enclose a cheque made payable to Redstone Wills Ltd for £

15. Additional Products and Services

Customer Care Package

Our secure storage includes fireproof storage, a free attestation check, free secure document delivery, free Will review on request, a free annual update service on request and serious illness and bereavement service. Please see our Customer Care leaflet for full information.

- Yes please, I would like to take the Customer Care Package when I return my signed Will to you for secure storage and agree that I will be invoiced for the annual storage and payment will be taken by Direct Debit.
- No thank you. I would like to store my valid Will at home.

Your marketing preferences

We would like to contact you in the future to provide you with information about products and services which Redstone Wills can provide. If you agree, on some occasions we will work with other businesses to put together offers we think may be of interest to you.

We would like to ensure that the information we send you is of interest and relevant to your needs. Please tick the boxes below to tell us which products and services you are interested in and would like to receive information about:

- Yes please, I would like to receive information about legal services. This could include Wills, Lasting Power of Attorney, Customer Care Plan, Will reviews and Estate Administration

Your communication preferences

Please tick the boxes below to let us know how you would prefer to hear from us:

- Yes please, I would like to receive communications by email
- Yes please, I would like to receive communications by telephone
- Yes please, I would like to receive communications by SMS message
- Yes please, I would like to receive communications by post

Please note you can change your communication and marketing preferences, or opt out of receiving all marketing communications at any time simply by writing to the Office Manager at Redstone Wills, Windmill Road, St Leonards on Sea, East Sussex, TN38 9BY or by emailing unsubscribe@redstonewills.co.uk.

16. Declaration

You must complete this section before submitting the form to us.

Please complete and sign the declaration and return the completed form in the prepaid envelope provided. Please note that further advice will not be given unless specifically requested. We do not provide advice on inheritance tax.

Please prepare a Will for me based on the instructions contained in this form.

I understand that:

- The information requested in this form is required for the purpose of preparing my Will and to ensure that the Will reflects my wishes.
- The information is being used by Redstone Wills who are responsible for preparing the Will.
- I may be contacted to confirm my instructions.
- Redstone Wills will charge for its services for acting as Executor after my death in accordance with its scale of fees applicable at that time.
- I certify that the information given in this form is true, complete and correctly represents my wishes.

Please note:

- An additional charge will arise after your Will has been prepared, should you make any alterations to your wishes that necessitates re-drafting your Will. Therefore please check carefully that this form does reflect your wishes and nothing has been left out.
- Redstone Wills reserves the right to make an additional charge if the nature of your instructions are such that time over and above what would be considered to be a reasonable time for preparing a Will is expended in completing your Will. You will be advised of the estimated additional charge before any work is undertaken.
- One of the most important aspects of the General Data Protection Regulation is the fair and transparent processing of your personal data which as a business we fully support. We believe in being open and honest about how we process your data and have produced this notice in support of your right to be informed. Please take time to read the Transparency Notice so that you may become familiar with how we use your personal data.

I certify that:

- **The information given in this form is true and complete and correctly represents my wishes.**
- **The instruction form was completed by myself.**
- **I am over the age of 18 and have the mental capacity to make a Will.**
- **I have had no undue pressure of influence from anyone to make this Will or provide the instructions that I have.**

Signature

Today's date