

Please summarise the approximate value of your assets in the table below.

	His	Hers	Joint
House			
Other Properties			
Foreign Property			
Contents/ Valuable Collections			
Cars			
Bank Balances			
Building Society Balances			
Shares			
Life Insurances			
Debts and Liabilities (if not insured)			
Other Assets (Please specify)			

### Inheritance Tax (IHT) Planning

Inheritance tax is only payable if your estate is worth more than £312,000 (for deaths or gifts after 5th April 2008). IHT is charged at 40% on excess over £312,000 when you die, although some of the tax can be paid by instalments over 10 years in certain cases.

If you would like to know more about what steps you can take to protect your estate and minimise the amount of inheritance tax you could be paying then please contact us.

### Other Services

#### Powers of Attorney

Thinking about your Will is also an opportunity for you to consider other matters of personal planning, such as Powers of Attorney, upon which we can advise. Please ask for a copy of our Powers of Attorney leaflet for further information, or alternatively call us for some initial advice and guidance.

#### Independent Financial Advice

If you would like investment advice we can introduce you to Independent Financial Advisers, including Welford Place Wealth Management.

#### LEICESTER

Spa Place, 36-42 Humberstone Road, Leicester LE5 0AE  
Tel: 0116 254 8871. Fax: 0870 383 5023  
Email: [romalley@braybray.co.uk](mailto:romalley@braybray.co.uk)

#### MARKET HARBOROUGH

51 High Street, Market Harborough, Leicestershire LE16 7AF  
Tel: 01858 467181. Fax: 01858 434362  
Email: [mvthill@braybray.co.uk](mailto:mvthill@braybray.co.uk)

#### HINCKLEY

33 Station Road, Hinckley, Leicestershire LE10 1AP  
Tel: 01455 639900. Fax: 01455 614331  
Email: [crlees@braybray.co.uk](mailto:crlees@braybray.co.uk)

[www.braybray.co.uk](http://www.braybray.co.uk)

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## Making your Will

[www.braybray.co.uk](http://www.braybray.co.uk)



Making a Will can be a straightforward process, which requires knowledge of your assets and your intentions relating to how your affairs are handled.

We will also be able to advise you of the best options to manage the amount of inheritance tax payable by your estate, which you may not have considered.

Please contact us to arrange a meeting to discuss your requirements; you may find it helpful to fill in this form before meeting with us.

	Mr	Miss/Mrs
Full Names		
Address		
Telephone Number		
Date of Birth		
Have you made a Will before? If so, where is it?		
If you are unmarried, do you expect to marry soon? <i>(Unless you provide to the contrary, marriage revokes your Will)</i>		
What do you want to happen to your body? <i>(Burial, Cremation, Medical Research or Transplant Surgery?)</i>		
Full Names of your children, their addresses and if they are under 18, their ages <i>(even if not beneficiaries)</i>		
Details of any children by any previous marriage		
Are you thinking of leaving everything to your spouse if you die first?		
Executors full names and addresses <i>(we will assume it is your spouse, if you have one, in the event that you die first, unless you indicate otherwise. beneficiaries can be executors, or you may prefer to appoint one or two of our partners. You can have up to 4 executors, and we advise you have at least 2)</i>		
Guardians names and addresses <i>(if you have children under the age of 18)</i>		
Details of any cash gifts or gifts of specific articles <i>(the name and address of the recipient, and their relationship to you, if any, and details of what they are to have. Include any charitable gifts, and if you want help in selecting a suitable charity, let us know - we have directories listing charities)</i>		
What is to happen to the residue of your estate? In particular, what happens if your chosen beneficiary, or one of them if there are several dies before you? <i>(the residue means what is left after legacies have been paid, and bills and funeral and other expenses of your estate have been settled)</i>		
At what age are any younger beneficiaries to inherit?		