



8 Step Guide to Making a Will

Inheritance is not a right but
protecting your family is.

Protect those who matter most

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S O L I C I T O R S

Step 1

Value your estate

Consider what you own – take into account all property, vehicles, savings, furniture, any collectors' items, jewellery etc

Step 2

Decide how you want to divide your estate

You can choose to divide your estate between a number of people, you can create trusts for children and you can make specific gifts to individuals.

Step 3

You can consider leaving a legacy

A legacy (donation in your Will) can be left to someone or to a charity of your choice

Step 4

Choose a legal guardian

If you have children consider who you feel would carry out your wishes in raising your children. You can make financial provisions in your Will to assist with their upbringing and education.

Step 5

Choose Executors

Executors can be anyone you feel would be appropriate to deal with the distribution of your estate. Sometimes people choose to make their solicitor an executor.

Step 6

Make the Will, sign & witness

Having established steps 1–5 the process of creating your Will becomes simpler and clearer and this can be drawn up for you.

2 independent adults (not beneficiaries) are required to witness your Will. One of these can be a solicitor or will writer.

Step 7

Store your Will safely

Many people choose to store their Will with the solicitor or will writer who has assisted them and in many cases this cost is part of a fixed fee.

Step 8

Review your Will every few years

Circumstances change, people get married, divorced, have 1 or more children, move house or start a business. It is advisable to review your Will every few years to ensure it still represents your wishes.

For further advice or to book a consultation, please call or email today.

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