



Checklist: How to review your Will

Since making your last Will:

| About You | Yes | No |
|--|-----|----|
| Have you got married? | | |
| Have you got separated or divorced? | | |
| Are you now living with a partner? | | |
| Have you had children? | | |
| Do you have more children now than you have named in your Will? | | |
| Have your financial circumstances changed significantly? | | |
| Have you given away or sold any item specified as a gift in your Will? | | |
| Do you own property abroad? | | |
| Do you own a business / share in a business? | | |
| Are you concerned about Inheritance Tax? | | |
| Beneficiaries | | |
| Have you changed your mind about who should inherit? | | |
| Have any of your named beneficiaries died? | | |
| Have any of your beneficiaries changed their names or address? | | |
| Are any of your beneficiaries vulnerable due to age, disability or lifestyle? | | |
| Do you want to find out how Trusts can help protect assets for future generations? | | |
| Guardians | | |
| Have you changed your mind about who should act as guardians? | | |
| Do you have any concerns about the age, health or mental capacity of your guardians? | | |
| Executors/ Trustees | | |
| Have you changed your mind about who should act as executors/trustees? | | |
| Do you have any concerns about the age, health or mental capacity of your executors/ trustees? | | |

Have you answered 'yes' to any of the above?

Contact us today to review your Will