

# WILLS, TRUSTS & LPAs

## MEMORANDUM OF WISHES

### Testator / Donor Details

#### 1. Client

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_  
Email address \_\_\_\_\_  
Occupation \_\_\_\_\_

#### 2. Client Partner (if applicable)

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_  
Email address \_\_\_\_\_  
Occupation \_\_\_\_\_

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## Executors, Trustees, Attorneys' Details

### 1. E T A ALL

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

### 2. E T A ALL

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

### 3. E T A ALL

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

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**Executors, Trustees, Attorneys' Details (continued)**

**4. E T A ALL**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

**5. E T A ALL**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

**6. E T A ALL**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

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## Beneficiaries' Details

1.

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

2.

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

3.

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

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**Beneficiaries' Details (continued)**

**4.**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

**5.**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

**6.**

Mr Mrs Ms Miss Name(s) \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
Relationship to client(s) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Phone number \_\_\_\_\_ Email \_\_\_\_\_  
Occupation \_\_\_\_\_

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**Beneficiaries - Registered charities**

**1.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

**2.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

**3.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

**4.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

**5.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

**6.**

Charity Name ..... Registered Charity No. ....

Address .....

..... Postcode .....

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## Legacies and Bequests - gifts of money and items

N.B. house contents, jewellery, specific items, & other tangibles are all dealt with in a Memorandum of Wishes which is a separate document to the Will.

This can be dealt with later if required as these details are not required for preparation of the Will, Trust, or LPA

If you own property how is it owned?                      Sole Name                      Joint Tenancy                      Tenants in Common

<b>Beneficiary Name</b> All names and titles	<b>Details of gift, legacy, or bequest</b> Full detailed description of item, monetary amount, or percentage - give an exact unambiguous description

Continue on a separate page if necessary