

## Essential Information Leaflet: Wills and Probate

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Wills and tax planning are important for most adults to consider during their lifetimes and failure to do so can have disastrous effects (for example, if you are married, are you aware that not all of your Estate may pass to your surviving spouse? Instead, depending on value, some of it may pass to other relatives or, if you have children, to them at 18). Whilst these are issues that most people put to the back of their minds or ignore, we strongly advise you to consider them before it is too late.

The basic information we require for our first meeting would include:

1. A list of property and assets with estimated values (include any mortgages and life policies) together with information as to sole or in joint ownership
2. A list of names and addresses of the person(s) to be appointed to manage your Estate(s) (this can be between 1 to 4 persons): person(s) responsible for signing any documents relating to it (in a Will they are called 'Executors and Trustees'). Beneficiaries can be appointed to act in this capacity.
3. If you have children under 18, a list of the names and addresses of the person(s) who would look after them until they reach that age (these are known as 'Guardians') in the event that there were no surviving parent
4. If you would like to make any specific gifts of items to named persons, a list of those items and the names, addresses and ages (if under 18) of the persons who are to benefit (including details of their relationship to you, for example, husband/wife/children/cousins, nephews/friends etc)
5. If you would like to make any gifts of cash to named persons, a list of the sums involved together with the names, addresses and ages (if under 18) of those persons (including details of their relationship to you)
6. Details of the person(s) to who(m) you would like to leave the rest of your Estate(s)
7. Details of what you would like to do with the rest of your estate(s) if one or more of the persons named in 6 above should die before you (would, for example, you like their share to pass to their children (if any) in equal shares or to some other named beneficiary(ies)?). If any named children are under 18, at what age you would like them to receive benefit?
8. Details of any requirements concerning burial or cremation (this is not mandatory)

Once we have fielded the above information we would be able to advise you on any tax implications that may arise and whether you should consider any other provisions that maybe more suited to your wishes or which may help to save tax, either during your lifetime(s) or by your Will(s).

We normally charge £150 plus vat for a single Will or, with married couples or Partners, £250 plus vat, provided that the Wills are relatively straightforward and do not involve more complicated tax advice or provisions (such as trusts). Should our charges be likely to exceed these sums, however, we would let you know at, or soon after, our first meeting.

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