

Why make a Will?

It's easy. A phone call to us is all you need to start things moving. We have a friendly and efficient staff who are used to dealing with your queries and will know the questions to ask in order to make sure that the Will we prepare for you is exactly what you want.

Why making a Will is so important

It is the only way of making sure your final wishes are carried out; without a Will the law decides who gets what, and your intentions may count for nothing. You can avoid all sorts of family disputes and disappointments.

- You can choose your Executors – these are the people who carry out your wishes
- You can dispose of your estate in the way you wish, and safeguard your dependents
- If you are not married, you can provide for your partner so that, for instance, your house or other items pass to them rather than your next of kin
- You can appoint Guardians for young children
- You can give instructions about your funeral
- Many people are able to take advantage of tax planning to save Inheritance Tax
- You can even make provision for your pets

Keep your Will up to date

Your assets and liabilities can change, as can the circumstances of your family or other beneficiaries. For instance, if your spouse or partner should have to go into nursing or residential care, you may wish to set up a Trust to provide income only, thus saving capital for your children.

“Do it yourself” Wills

Avoid the temptation to do it yourself. The wording in home-made Wills is often ineffective in carrying out your exact wishes, and can result in setting up unnecessary trusts or only deal with a part of your estate.



When you need strength and support ...

...we are with you all the way

A professionally prepared Will ensures peace of mind for your family and especially yourself. Proper planning means you will have a simple, tailor-made Legal Will. The cost is low considering the potential advantages to your Estate. Our staff will quote you our current fees. Should you have fairly complex financial affairs and need tax planning advice, expect to pay slightly more.

Who keeps your Will?

We will keep it secure for you, free of charge.

Who should be appointed as Executors?

You should appoint at least two executors, who will be legally responsible for carrying out your wishes. You may appoint family, trusted friends or professionals such as Partners at Sydney Mitchell.

We will discuss with you the most suitable appointment depending on your circumstances.



Tracy Creed, Head of Private Client

Tracy has extensive experience in all areas of Private Client work including:

- Trusts
- Wills
- Probate
- Inheritance Tax planning
- Estate planning
- Care funding issues

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What next?

Call any of our offices on the numbers shown or for specialist advice it is recommended that you call one of our private client specialists.