



ALEX TRUESDALE WILLS
LIMITED

Family Inheritance Planning – talking points

Any Will should reflect the particular wishes and concerns of the individual making it. The following list includes topics that previous Alex Truesdale Wills clients have raised, any of which could affect your Will or related matters – you might find it a useful checklist prior to your first appointment with us.

Please take a few moments to read the list and tick those topics relevant to you. Everyone is different, so there are no right or wrong answers and you can always change your mind as we discuss your particular situation at our meeting. If answering as a couple, you need not agree on the answers – just tick all topics that either or both of you want to discuss.

Please tick ALL topics relevant to your situation/s.

	CLIENT 1	CLIENT 2
<input type="checkbox"/> I want to make everything as easy as possible for my family	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I have one or more children under 18 <i>(and so must nominate a Guardian)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I should like to leave guidance on my children’s upbringing	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I am concerned about who will look after the money for my children or grandchildren <i>(Trustees)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> My children are too young or inexperienced to handle a major inheritance <i>(inheritance to be looked after until they are at least 18 or perhaps 21 or 25)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> My children or other beneficiaries could have particular problems in the future <i>(they might need help managing their inheritance even beyond age 25)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> There are step-families involved, which might need careful planning <i>(trusts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I have recently married or remarried	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I am thinking of getting married/forming a civil partnership	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I am engaged	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I am co-habiting with my partner	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I have become estranged from certain family members	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I am considering leaving someone out of my Will	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Someone might challenge my Will	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Someone has applied to reassign their gender	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I wish to minimise the Inheritance Tax (IHT) that might be paid by my family <i>(trust, RNRB gifts, charitable giving)</i>	<input type="checkbox"/>	<input type="checkbox"/>



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- I am concerned that others might lose their inheritance to fees for Social Care (*trusts*)
- I want to take care of my spouse/partner but also want to ensure that as much as possible is passed on to the children (*trusts*)
- I am concerned that someone inappropriate will gain control of the inheritance (*trusts*)
- There is a business involved (*this might benefit from particular provisions*)
- There is farming or agriculture land involved (*this might benefit from particular provisions*)
- I have assets abroad
- It is likely that in due course I will receive a significant inheritance
- I am concerned about how to leave digital assets
- I want to protect the family inheritance for grandchildren and future generations, and/or against money being lost to financial problems, future divorces and re-marriages (*trusts*)
- One or more family members has a disability and/or a learning disability (*trusts*)
- I am thinking of leaving a gift to charity
- I am concerned about who will put the Will into practice (*Executors*)
- If I have an accident or become too frail, who will manage my money and property? (*Lasting Power of Attorney – Property & Financial Affairs*)
- If I have an accident or become too frail, who will decide where I live or what care I need? (*Lasting Power of Attorney - Health & Welfare*)
- I might have problems if I could not access my partner or spouse's share of property/savings/income (*lifetime trusts*)
- I should like to be certain about my funeral arrangements (*funeral advice*)
- I am worried about the cost of my funeral (*pre-paid Funeral Plan*)

Date:

Please bring this list to your first appointment

Thank you

07887 946 557 | info@alextruesdalewills.com | www.alextruesdalewills.com

