

# A STEP BY STEP GUIDE TO — MAKING A WILL —



1

You have decided you need to make a Will

2

Complete a Will Questionnaire or arrange a meeting to discuss your wishes

3

Value your assets including those held abroad or jointly with another person

9

Return client care letter and ID

10

We shall provide you with further IHT advice (if required)

11

A draft Will is prepared and sent to you for checking along with a plain English version

15

A meeting is arranged to sign the engrossment copy at our office. Alternatively, we can send the engrossment copy to you for signing at home. We also provide you with full instructions on how to sign your will in accordance with legal requirements

16

We check your Will to ensure it has been signed in accordance with legal requirements

4

Consider your assets and decide who you would like to leave them to. The people you leave your assets to are called Beneficiaries. You can leave specific items or a share of everything you own

5

Consider who you would like to carry out the instructions contained in your Will. These people are called the Executors. You may appoint anyone to act as your Executor and may appoint a professional such as a Solicitor

6

We will help you determine if you will need to pay Inheritance Tax (IHT) when you die and if so, we will tell you the amount of tax that needs to be paid

12

If amendments are needed, a further draft is sent to you for checking

13

If no amendments are needed, the engrossment copy (final version) is prepared

14

Our fees are paid

17

You decide where you would like to store your original Will. If you decide to keep your original at Jackson Barrett and Gass, we will provide you with photocopies

7

If IHT is due, we will discuss how to reduce your tax bill

8

We will send you a client care letter

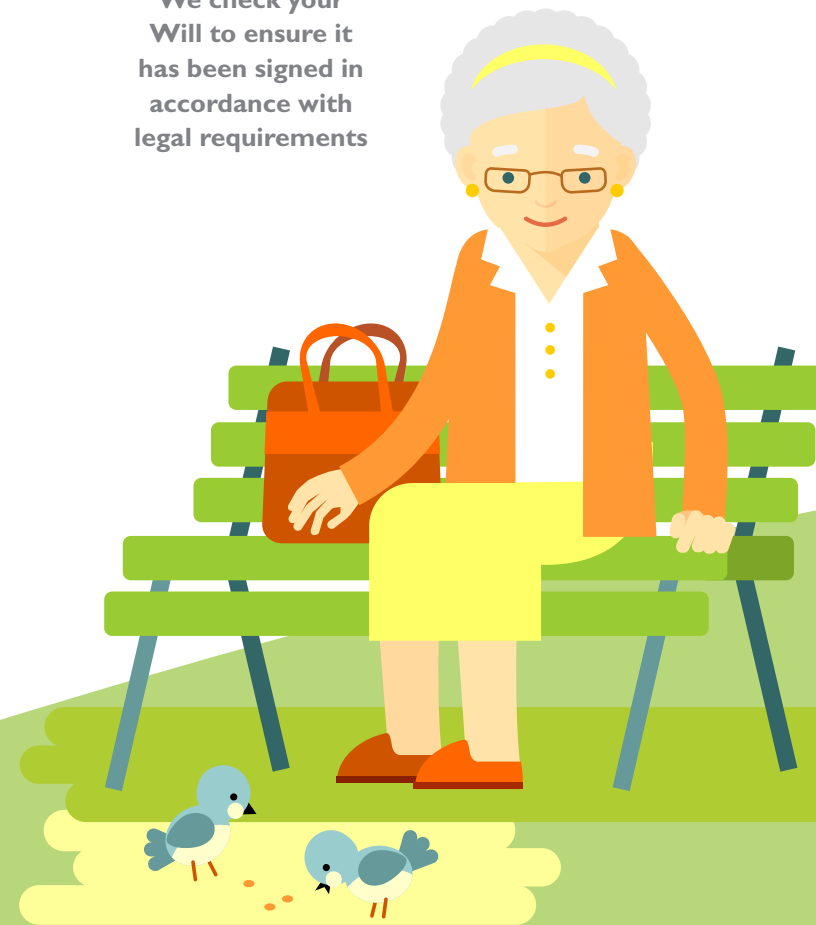


We recommend reviewing your Wills at least every 3 to 5 years

You should consider Wills and Inheritance Tax planning as part of your overall Lifetime Planning - [jbgass.com/lifetime](http://jbgass.com/lifetime)

We can provide copies of your Will to your Executors and Beneficiaries for no additional charge

If you sign your Will at our office, we will act as witnesses



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