

# Checklist: How to review your Will

Since making your last Will:

| <b>About You</b>   | <b>Yes</b> | <b>No</b> |
|--|------------|-----------|
| Have you got married?  |            |           |
| Have you got separated or divorced?  |            |           |
| Are you now living with a partner?   |            |           |
| Have you had children?   |            |           |
| Do you have more children now than you have named in your Will?                                |            |           |
| Have your financial circumstances changed significantly?                                       |            |           |
| Have you given away or sold any item specified as a gift in your Will?                         |            |           |
| Do you own property abroad?  |            |           |
| Do you own a business / share in a business?   |            |           |
| Are you concerned about Inheritance Tax?   |            |           |
| <b>Beneficiaries</b>   |            |           |
| Have you changed your mind about who should inherit?   |            |           |
| Have any of your named beneficiaries died?   |            |           |
| Have any of your beneficiaries changed their names or address?                                 |            |           |
| Are any of your beneficiaries vulnerable due to age, disability or lifestyle?                  |            |           |
| Do you want to find out how Trusts can help protect assets for future generations?             |            |           |
| <b>Guardians</b>   |            |           |
| Have you changed your mind about who should act as guardians?                                  |            |           |
| Do you have any concerns about the age, health or mental capacity of your guardians?           |            |           |
| <b>Executors/ Trustees</b>   |            |           |
| Have you changed your mind about who should act as executors/trustees?                         |            |           |
| Do you have any concerns about the age, health or mental capacity of your executors/ trustees? |            |           |

**Have you answered 'yes' to any of the above?**

**Contact us today to review your Will**