

Basic Information Required for Wills & LPA's

Wills

- 1 – Your full name, address, date of birth and contact details

- 2 – Executors (minimum of 1, maximum of 4) full names and addresses & relationship to you

- 3 – Substitute Executors - details as above

- 4 – Guardians for any children under 18 years old – details as above

- 5 – Gifts – describe the item and give details of who it should go to

- 6 – Gifts of money – £ amount and who is it to go to

- 7 – Beneficiaries – list full details and the % they are to receive

- 8 – Funeral wishes – buried or cremated

LPA's – usually the same people for both types of LPA, (Property & Affairs or Health & Welfare)

- 1 – Attorneys - full names, addresses, contact details and dates of birth & relationship to you of between 1 and 4 attorneys

- 2 – Certificate Provider – full name, address of someone who has known you for more than 2 years and who will verify that you are currently of sound mind

- 3 – Inform – full name and address of someone to tell that you are creating an LPA who is not mentioned elsewhere on the form