

# S I M O N C A R T Y S O L I C I T O R S



in association with

**Note:**

*The person executing the Will is called the Testator.*

*The Testator must appoint someone to act for their Estate when they pass away this person will be responsible for the management of the affairs of the Estate for example executing the necessary documents to transfer money from accounts. This person is called the Executor/Executrix.*

*Normally a married Testator will appoint their Spouse as Executor but there is no obligation to do so. There is no limit on the amount of Executors but the standard is one or two.*

1. Name of Testator: \_\_\_\_\_

2. Principal Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Owner/Occupier  Tenant  Other

*If Other Please Specify* \_\_\_\_\_

4. Is Testator Sole Owner: Yes  No

5. Details of Co-Owner: \_\_\_\_\_

6. Relationship to Testator: \_\_\_\_\_

7. Property owned as: Joint Tenants  Tenants in Common   
*(if known)*

8. Marital Status: Single  Married    
Widowed

Co-Habiting  Divorced  Separated

9. Spouse/Partner Name: \_\_\_\_\_

10. Spouse/Partner Address: \_\_\_\_\_  
*(if Different)*

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11. **Other Property:**  
*Please specify Address of Properties Owned together with co-owners/joint tenants names and address – please use separate sheet if required*
12. **Executor's Name:**  
*(if different from Spouse)*
13. **Executor's Address:**
14. **Does Testator have Dependents:**    Yes        No
15. **No. of Dependents:**
16. **Dependent Name & Address:** 1.  
  
2.  
  
3.  
  
4.
17. **Are any Dependents under 18?**    Yes        No
18. **Do any Dependents have Special Needs?**    Yes        No
19. **Name of Trustee<sup>1</sup>/Guardian<sup>2</sup>:**
20. **Address of Trustee/Guardian:**

*<sup>1</sup> In the event of the Testator's initial Executor being their Spouse and the Spouse predecease them or die simultaneously with them or if he/she does not survive the Testator by more than one month then a further Executor/Trustee should be*

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*appointed.*

*<sup>2</sup> In the event of the Testator's children/dependents being under the age of 18 or have Special Needs a Guardian must be appointed to "guard" the Children/Dependents, a Trustee will be appointed to manage the finances of the Estate for the child/dependent and an Executor to manage the Estate.*

*NOTE: A Trustee, Guardian and Executor can be the same person*

*Please set out the names and address of the people who you wish to inherit from you under your Will. Please note that if married provision must be made for your Spouse. Also while no provision must be made for your children (if any) if you decide to disinherit them they may challenge the Will in Court after the Will is read. If leaving a bequest to a minor (under the age of 18) or a beneficiary with Special Needs please fill in Section B.*

**SECTION A**

<i>Name of Beneficiary</i>	<i>Address of Beneficiary</i>	<i>Bequest</i>
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**SECTION B**

**NOTE:**

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**Additional Requirements such a burial requests should be included a Letter of Wishes which should be completed and kept with a copy of your Will and your proposed Executor informed of its location.**

