



# Chadwick Lawrence

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LLP

SOLICITORS

# INSTRUCTIONS

## HOW TO COMPLETE THESE FORMS

In order for Chadwick Lawrence to draft the documentation correctly, and provide the highest quality service, it is crucial that they are provided with adequate and accurate information. The following information will help us understand your requirements and ensure you provide us with clear instructions.

- For every case that you submit please complete the booklet comprehensively.
- When you complete a particular section, if there is not enough room please use the additional information section at the back or a separate sheet and attach it to this booklet, making sure that your name is clearly shown.
- If there is no obvious place in the booklet for a piece of information or a relevant instruction please use the additional information pages at the back.
- Should you have any queries concerning the completion of the client instruction booklet please telephone 01924 379078.
- Please complete the forms legibly.
- Once completed, this booklet should be sent to Chadwick Lawrence's office. The contact details are as follows:

Paul Hirst  
Chadwick Lawrence LLP  
2a Red Hall Crescent  
Paragon Business Village  
Wakefield WF1 2DF  
Tel: 01924 379078  
[paul.hirst@chadlaw.co.uk](mailto:paul.hirst@chadlaw.co.uk)

**CLIENT INFORMATION**

Account Ref. / Client No.  
(where appropriate)

**Please complete all of the pages within the client information section.**

**1 PERSONAL DETAILS**

	CLIENT A	CLIENT B
Full name(s) & Titles	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Current Address	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
Postcode	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Email Address	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Telephone number(s): (including STD codes)	Daytime: <input style="width: 100%; height: 20px;" type="text"/> Evening: <input style="width: 100%; height: 20px;" type="text"/>	Daytime: <input style="width: 100%; height: 20px;" type="text"/> Evening: <input style="width: 100%; height: 20px;" type="text"/>
Date of Birth (dd/mm/yyyy)	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>
Marital Status (single/married/separated/divorced/widowed /civil partners)	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
If you would like to deal with Chadwick Lawrence LLP electronically and receive all correspondence and draft documents by email please tick this box	<input style="width: 40px; height: 20px;" type="checkbox"/>	<input style="width: 40px; height: 20px;" type="checkbox"/>

Date of current marriage	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>
If you have previously been married, or in a civil partnership, please give details of:		
The date(s) of each marriage and	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>
The date(s) of dissolution	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>

**2 BENEFICIARIES**

	CLIENT A	CLIENT B
Please be clear to distinguish children who are the children of one of you only and children common to you. Dates of birth only required if under 18		
(a) Children (full name(s) and titles (s))	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Current address	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
Postcode	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Date of Birth (dd/mm/yyyy)	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>
Children (full name(s) and titles (s))	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Current Address	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
Postcode	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Date of Birth (dd/mm/yyyy)	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>
(b) Grandchildren (full name(s) and titles (s))	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Current Address	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
Postcode	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
Date of Birth (dd/mm/yyyy)	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/> / <input style="width: 100%; height: 20px;" type="text"/>

Grandchildren (full name(s) and titles (s)) Current Address		
Postcode		
Date of Birth (dd/mm/yyyy)	/ /	/ /
(c) Stepchildren (full name(s) and titles (s)) Current Address		
Postcode		
Date of Birth (dd/mm/yyyy)	/ /	/ /
Stepchildren (full name(s) and titles (s)) Current Address		
Postcode		
Date of Birth (dd/mm/yyyy)	/ /	/ /
(d) Any other close relative(s)/friend(s) who may be a beneficiary		

<b>3 PROPERTY ASSETS</b>	<b>CLIENT A</b>	<b>CLIENT B</b>	<b>JOINT</b>
For each property owned, please indicate: a) Address or description including postcode			
b) Tenure – Is the property owned outright or leased?			
c) Land Registry Title Number (If Known)			
d) Location of the deeds (if title is unregistered)			
e) Mortgages			
(1) name and address of lender			
Postcode			
(2) Amount Outstanding (approximately)	£	£	£
f) Is any of the property let? (if so, give details)			

g) Is any part of the property used for agricultural or business purposes? If so, give a brief explanation

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h) Estimated value

£	£	£
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If it is joint property, how is it held?  
Please tick as appropriate, if known

Tenants in Common	<input type="checkbox"/>	Joint Tenancy	<input type="checkbox"/>	Don't know	<input type="checkbox"/>
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**3.1 OTHER ASSETS**

	CLIENT A	CLIENT B	JOINT OWNS
a) Business or agricultural interests (give brief details)			
b) Any other assets			
c) Significant liabilities loans / maintenance arrangements			

**4 INSTRUCTIONS FOR DISPOSAL OF ESTATE**

1. Would you prefer to be buried or cremated?

	Client A	Client B	
Buried	<input type="checkbox"/>	<input type="checkbox"/>	<i>Please tick one box</i>
Cremated	<input type="checkbox"/>	<input type="checkbox"/>	
No Preference	<input type="checkbox"/>	<input type="checkbox"/>	

2. Do you have any specific wishes concerning your funeral, cremation, use of your body for medical or therapeutic purposes, or any other wishes of this nature?

3. Who will be your executors? – The same for both spouses (unless otherwise indicated, in which case, please indicate in the Additional Information section). Address not required if previously given.

*Note: If Chadwick Lawrence is appointed as sole Executor of your estate you will receive a discount of 5% on the cost of administering your estate.*

Chadwick Lawrence	<input type="checkbox"/>	
Chadwick Lawrence and the following	<input type="checkbox"/>	<i>Please tick one box</i>
Just the following	<input type="checkbox"/>	

Full Names(s)	1.	2.
Current Address		
Postcode		
Relationship to You / Spouse		
Full Names(s)	3.	4.
Current Address		

Postcode	<input type="text"/>	<input type="text"/>
Relationship to You / Spouse	<input type="text"/>	<input type="text"/>

*Note: Two individual Executors are recommended but you can have a maximum of four.*

4. If you have minor children, who will be their guardian(s)? – the same for both spouses

Full Names(s)	<input type="text"/>	<input type="text"/>
Current Address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Relationship to You / Spouse	<input type="text"/>	<input type="text"/>

*Note: A maximum of two guardians (if a couple) are recommended*

**5. LEGACIES  
CLIENT A**

AMOUNT OR DESCRIPTION	NAME & ADDRESS OF RECIPIENT	DATE OF BIRTH IF UNDER 18	1 <sup>ST</sup> DEATH, 2 <sup>ND</sup> DEATH OR SPECIFIC TO CLIENT A's WILL
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**CLIENT B**

AMOUNT OR DESCRIPTION	NAME & ADDRESS OF RECIPIENT	DATE OF BIRTH IF UNDER 18	1 <sup>ST</sup> DEATH, 2 <sup>ND</sup> DEATH OR SPECIFIC TO CLIENT A's WILL
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Notes: Legacies should usually be to named persons or organisations outright, (unless the legacy is for minors on attaining age 18). Legacies may be gifts of money or gifts of jewellery, specific chattels or other specific items.*

Please be absolutely clear whether legacies are to be paid on the first or second death or from the estate of one of you in particular (irrespective of the order of death), or in some cases on both deaths.

## 6. RESIDUARY ESTATE ON SECOND DEATH

Please indicate the extent of entitlement to your residuary estate within the alternatives referred to below. In all cases, spouse to be left all of residuary estate on first death.

CATEGORY OF BENEFICIARY	FULL NAME	ENTITLEMENT (e.g. X% or fraction)
Children		
Grandchildren		
Other Named Individuals		
Charity		

*Notes: A requirement for substitution to apply will be assumed i.e. if a primary beneficiary (usually a child) predeceases then his or her children will stand in his or her shoes (at 18) and inherit his or her share equally.*

*Please specify 'long-stop' beneficiaries. This will be the person(s) or organisation(s), who you wish to benefit, should all the other beneficiaries pre-decease you, e.g. a specified charity.*

Full Names(s)	<input type="text"/>	<input type="text"/>
Current Address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Registered charity number	<input type="text"/>	<input type="text"/>
Do you have an existing Will?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If Yes, where are the originals stored?	<input type="text"/>	

If convenient, please supply copies.



[www.chadwicklawrence.co.uk](http://www.chadwicklawrence.co.uk)

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