

Skipton Will Writing Service for Intermediaries

Instruction Form

The simple, straightforward way
to make your wishes known

Will instructions

To commence the will writing process you must now complete your personal information and detail how your estate should be distributed on your death. If you are unsure which will is the most suitable for you please call your Intermediary Sales Manager (ISM) on 0800 87 66 010* or refer to page four of the Will Writing Guide.

Please complete this form using black ink.

Please specify whether these instructions relate to a:

Single will Mirror will Discretionary Trust and Mirror will

NB references to civil partnerships in these instructions apply to civil partnerships registered on or after 5 December 2005.

Personal details

Title: (Mr/Mrs/Ms/Miss/Other)	Full Postal Address:
Surname:	
Full Forenames:	Home Tel No [†] :
Date of Birth:	Daytime Tel No [†] :
Town and Country of Birth:	Mobile Tel No [†] :
Email Address:	

*Please complete so Skipton Trustees Limited can contact you to prepare your will.

Spouse/partner's details

Title: (Mr/Mrs/Ms/Miss/Other)	Full Postal Address:
Surname:	
Full Forenames:	Home Tel No:
Date of Birth:	Daytime Tel No:
Town and Country of Birth:	Mobile Tel No:
Email Address:	

Do you consider yourself to be permanently resident in England or Wales?

Yes No

Are you married/or intending to be married in the near future?

Yes No

Do you consider yourself to be permanently resident in Scotland?

Yes No

Are you entering into or are you already in a registered civil partnership?

Yes No

Do you consider yourself to be permanently resident in Northern Ireland?

Yes No

If you consider yourself to be permanently resident elsewhere, please state which country

Your estate

(Please refer to page eight of the Will Writing Guide)

Assets	You	Spouse/Partner/ Civil Partner	Jointly owned
Property assets	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
Remainder of assets	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>
Liabilities	<input type="text" value="£"/>	<input type="text" value="£"/>	<input type="text" value="£"/>

Joint assets (not with spouse/partner/civil partner)

Do you have any UK assets owned jointly, with another person or organisation, who is not your spouse/partner/civil partner?

Yes No

If 'Yes', please give the following details:

Name(s) of joint owner(s)	Total value of asset(s)	% share which you own
<input type="text"/>	<input type="text" value="£"/>	<input type="text" value=""/>

Details of asset(s)

Foreign assets

Do you have any assets outside the United Kingdom?

Yes No

If 'Yes', please give details: (ie what the asset is, country in which it is held and its approximate value)

Have you made a will in the particular country or countries?

Yes No

Existing trusts

Are you a beneficiary under a current trust? If 'Yes', please give details:

Yes No

Details of children/stepchildren/grandchildren

Number of children	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>
Number of stepchildren	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>
Number of grandchildren	<input type="text"/>	Number under 18	<input type="text"/>	Number over 18	<input type="text"/>

Executors

Please indicate who you wish to appoint as executors. If you are considering appointing Skipton Trustees Limited please refer to the Estate Administration Guide (copies are available from your ISM).

Skipton Trustees Limited <input type="checkbox"/> jointly with spouse/ partner/civil partner	Your spouse/partner/ civil partner or if they are unable to act, Skipton Trustees Limited	Skipton <input type="checkbox"/> Trustees Limited sole	Other (please indicate)
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Name

Address

Funeral instructions

Do you wish your body to be:

Buried Cremated No preference

Does your spouse/partner wish their body to be:

Buried Cremated No preference

If you have any special instructions, we suggest you detail these in a separate note which is kept with your will.

Guardians

If you have any children who are under 18 years of age you may appoint Guardians to look after them in the event of your death (and your spouse/partner/civil partner). **Please place contact details in the box below.**

Name	Address

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Gifts

Many people wish to make gifts of money or special items, these are known as "legacies".

You should now consider any gifts you wish to make, **please write details in the box below and attach an additional sheet if required.**

Gift	Name	Address	Relationship to you

The residue of your estate

You must now consider who will receive the "residue" of your estate, which is what remains after your debts, taxes and any gifts listed above have been taken out. You can choose your spouse/partner/civil partner, your children, a charity or somebody else.

We have identified the three most common ways of dealing with the residue of an estate. Read them carefully and choose **one** which best suits you. If you are in doubt, let us know and we will advise you.

Select one only:

- I wish to leave all the "residue" of my estate to my partner, but if he/she dies before me, to the people named overleaf.
- I wish to leave all the "residue" of my estate to my partner, but if he/she dies before me, to the people named overleaf in the percentages indicated.
- I wish to leave all the "residue" of my estate to the person(s) or organisations listed overleaf in the percentages indicated.

Declaration

Please complete and sign the declaration and return the completed Form.

Please prepare a will for me based on the instructions contained in this form.

This Instruction Form was completed by myself or

I understand that:

- Skipton Will Writing Service is administered by Irwin Mitchell on behalf of Skipton Trustees Limited. Irwin Mitchell are regulated by the Solicitors Regulation Authority.
- The information requested in this form is required for the purpose of preparing my will and to ensure that the will reflects my wishes.
- The information is being used by Skipton Trustees Limited, who through the Skipton Will Writing Service, are responsible for preparing the will.
- I may be contacted to confirm my instructions.
- Skipton Trustees Limited will charge for its services for acting as Executor after my death in accordance with its scale of fees applicable at that time.
- I certify that the information given in this form is true, complete and correctly represents my wishes.

Please note:

- An additional charge will arise after your will has been prepared, should you make any alterations to your wishes that necessitates re-drafting your will. Therefore please check carefully that this Form does reflect your wishes and nothing has been left out.
- Skipton Trustees Limited reserve the right to make an additional charge if the nature of your instructions are such that time over and above what would be considered to be a reasonable time for preparing a will, is expended in completing your will. You will be advised of the estimated additional charge before any work is undertaken.
- Your details are held by Skipton Trustees Limited, Skipton Building Society and Irwin Mitchell as joint data controllers. Your details may be passed to our agents or third party administrators.
- You have the right of access to your personal records held on Skipton Trustees Limited's and Skipton Building Society's files by written request to The Compliance Officer, Skipton Building Society, The Bailey, Skipton, North Yorkshire BD23 1DN and The Compliance Officer, Irwin Mitchell, Riverside East, 2 Millsands, Sheffield S3 8DT.

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Keeping you informed

Skipton Building Society, Skipton Trustees Limited and other companies within the Skipton Building Society Group (a list of whom is available on request) may use the information on this Form to provide you with details of selected products and services by post or by telephone. If you do not want to receive information by post, please tick this box .

If you do not want to receive information by telephone, please tick this box .

Only provide your email address if you wish to receive marketing information from Skipton Building Society.

Email address:

Giving your consent to the use of your personal information

It is important that you read this page carefully as, by signing this application, you agree that we can use your information in the way as described above.

I certify that the information given in this form is true and complete and correctly represents my wishes.

1st Signature

2nd Signature

Date

Date

Will Writing Service charges[¥]

We are committed to offering you value for money and explaining clearly what this service will cost.

The charges set out below reflect the work involved from the taking of instructions through to the storage of your will. We have negotiated an excellent deal for the legal work required in the preparation of a Will with Irwin Mitchell. An administrative fee is payable by Skipton Trustees Limited (STL) to them for their work which is set out below.

Service	Cost (£)	VAT (£)	Payment by STL to Irwin Mitchell (inc. VAT) (£)	Total Charge (£) to customer
Single will	95.00	16.63	49.94	111.63
Mirror will	150.00	26.25	74.91	176.25
Discretionary Will Trust and Mirror will	375.00	65.63	164.79	440.63
Severance of Joint Tenancy				
England, Wales and Northern Ireland	86.67	15.17	94.88	101.84
Scotland	450.00	78.75	521.79	528.75
Lasting Power of Attorney – Property and Affairs ^f Single Person	398.50	69.74	346.63	468.24
Lasting Power of Attorney – Property and Affairs ^f Husband and Wife/Partners	493.00	86.28	440.63	579.28
General Power of Attorney – Single Person	180.00	31.50	89.89	211.50
General Power of Attorney Husband and Wife/Partners	220.00	38.50	119.85	258.50
Will retrieval fee	25.00	4.38	0.00	29.38 [#]

[¥]See Tariff of Charges for full details.

[#]A retrieval fee is payable if your will is to be amended by another solicitor.

Please note if any additional legal work is required, a new quotation will be provided for approval before proceeding.

^fAdditional charges apply to register your Lasting Power of Attorney at the Office of the Public Guardian. Please see the Tariff of Charges for full details.

Method of payment:

Please tick your preferred payment method:

By Cheque – Please make your cheque payable to Skipton Trustees Limited and enclose your payment with your completed will writing Instruction Form

OR

By Credit/Debit Card – Please complete the following details and sign below in order that Skipton Trustees Limited can collect the payment:

Card type	<input type="text"/>	(ie Visa/Mastercard/Maestro)
Account name	<input type="text"/>	
Card number	<input type="text"/>	
Expiry date	<input type="text"/> / <input type="text"/> MM/YY	Valid from date <input type="text"/> / <input type="text"/> MM/YY (if relevant)
Issue number	<input type="text"/> (Debit cards only)	
Amount to be debited	£ <input type="text"/>	
Signature of account holder	<input type="text"/>	
Date	<input type="text"/>	

Broker details

Broker Name

Broker Postcode

Intermediary Sales Manager name

Cost Centre

Company status

Appointed Representative

Directly Authorised

Mortgage Club

Non Regulated

FSA registration no. (if applicable)

Network/Mortgage Club (if applicable)

Network/Mortgage Club address (if applicable)

Notes

Principal Office, The Bailey,
Skipton, North Yorkshire BD23 1DN
Telephone: 08458 501700*

intermediaries**matter**



Skipton Building Society is a member of the Building Societies Association.

Authorised and regulated by the Financial Services Authority under registration number 153706.

*To help maintain service and quality, some telephone calls may be recorded and monitored.

Skipton Will Writing Service is provided by Skipton Trustees Limited. Skipton Trustees Limited registered office is situated at The Bailey, Skipton, North Yorkshire BD23 1DN. Registered in England no. 6258324. Skipton Will Writing Service is administered by Irwin Mitchell LLP of Riverside East, 2 Millsands, Sheffield S3 8DT which is a limited liability partnership registered in England and Wales, company number OC343897. Other than in Scotland, Irwin Mitchell is regulated by the Solicitors Regulation Authority, registration number 51747. Skipton Estate and Trust Administration Service is administered by Pearson Jones plc of Clayton Wood Close, West Park Ring Road, Leeds LS16 6QE or Irwin Mitchell.