



WILL & WISHES LETTER(S) UPGRADE APPLICATION FOR SINGLE PERSONS

New Will required:

New Wishes Letter required:

Number of Deed of Appointment/Retirement of Trustees:

(These will only be required if the Client wants to change Trustees of the existing Trusts. Executors can be changed as part of the new Will, please fill in separate application form to change Trustees)

SUMMARY OF NEW INSTRUCTIONS (TICK IF CHANGES ARE REQUIRED)

Amendments to Wishes Letter(s)

Children's details

Executors

Guardians

Chattels

Specific legacies

Funeral wishes

SETTLOR'S DETAILS

Title

Full name

Country of
Domicile

UK

Other

D.O.B.

Address

Tel.

Postcode

Email

IMPORTANT - Has the Testator been previously widowed?

If yes please detail in notes section

Yes

No

Trust Beneficiaries for Wishes Letter(s)

The Beneficiaries under the Trust(s) are discretionary Beneficiaries. With a Discretionary Trust the Trustees decide the detail of **who** benefits from the Trust, and when they benefit, from those classes or named Beneficiaries defined below. **Please remember that the Settlor will not be a Beneficiary.** Trustees, provided they are not the Settlor, **can** be Beneficiaries.

Have any Trustees, Beneficiaries or Executors died (if so please detail below)

FINANCIAL INFORMATION

Please provide approximate values to ensure that we can confirm the most appropriate planning.

Principle Private Residence	£
Savings and Investments (excluding Pensions)	£
Other Property	£
Qualifying Business Assets	£
Pensions	£
Death In Service	£
Total Assets	£

Solidus will rely on this information to provide the correct advice

Please review your existing Wishes Letter(s) (copy available in your Solidus binder) and advise any amendments below.

Amendments to Wishes Letter(s)

Copy of existing Client Will included?

ACTION OF CLIENT'S WILL

The Beneficiary Protection Plan integrates the Will of a Client with the lifetime Trust framework. On the death of the Client **their whole estate after any gifts will usually be directed to one or more of their Trusts**. IHT is payable on values over the Client's Nil Rate Band Allowance and Residence Nil Rate Band Allowance if applicable.

Please advise below if you require anything other than all assets going into Trust for your children in equal shares and then onto their descendants.

Please note the executors of the estate can claim any required RNRB allowance as part of the probate process.

CHILDREN'S DETAILS

Please confirm your children's full names, addresses and date of birth (if not already provided in the Trustee section). **Confirm the child is your natural child**. Please note that step-child is not a legal term, so such persons should be identified by their full name and address.

Name	Address	Gender	Date of birth	Natural/adopted or step-child

Is the intention that the children will benefit equally from the Trust framework?

Yes No If no, provide instructions

If a child dies leaving children, should their children inherit?

Yes No If no, provide instructions

If a child dies whilst married, should their widow/widower benefit from the estate?

Yes No If no, provide instructions

FOREIGN PROPERTY

Please note that all foreign property is excluded from our planning.

FURTHER WILL INSTRUCTIONS

Executors

The job of the Executor is to make sure the wishes expressed in the Will are carried out. In most cases the Executors will appoint Solidus IEP or our legal partner to do this and the work associated with the Trust in order to maximise the benefit of the planning, however it is at the Executors' discretion. Please provide details of your Executors, normally the same as the Trustees of your Trust.

Name	Address	Relationship to you

Guardians

Please provide guardian details for any children under the age of 18.

Name	Address	Relationship to you

Chattels

If you have any specific items e.g. jewellery you wish to leave, please provide details below

Description	Recipient (name and full address)	Relationship to you

Specific Legacies

If you wish to give any specific cash legacies on death, please provide details below.

Gift description (e.g. £10,000)	Recipient (name and full address)	Relationship to you

Funeral Wishes

If you wish to give any specific funeral wishes, please provide details on the notes page

Buried

Cremated

None

MENTAL CAPACITY

In English Law, the case of Banks v Goodfellow (1870) provided us with a test considering a person's mental capacity and whether they have due knowledge and understanding to make a Will. In essence, a person must have a firm understanding of what they hold in their estate, how they wish to distribute their estate and the effect that this will have. They must have arrived at their decision on how to distribute their estate on their own, without the influence of others, and the contents of their Will must reflect their true wishes and intentions.

The following questions must be completed by the instruction taker, this is important for your own protection:

Does the Testator understand that they are giving instructions from which their Will shall be drafted?

Yes No

Does the Testator recollect in general terms what is owned by them?

Yes No

Is the Testator aware of who might be considered to have a moral claim on their estate – friends or relatives – even if they choose them not to benefit?

Yes No

Is the Testator broadly aware of how the estate will be shared out?

Yes No

How long have you known the Testator?

Have Wills previously been prepared for the Testator and are copies available?

Yes No

Was there a discussion about earlier Wills? If so, please detail what was discussed

Was the meeting face to face?

Yes No

Were there any signs of confusion or memory loss?

Yes No

Have there been any recent bereavements?

Yes No

Who was present when instructions were taken and why?

DATA PROTECTION STATEMENT

Solidus IEP Ltd ("**Solidus**") is totally committed to full compliance with the requirements of the General Data Protection Regulations ("**GDPR**") and the Data Protection Act and will follow procedures which aim to ensure that all employees and legal and professional partners, who have access to any personal data held by or on behalf of Solidus, are fully aware of and abide by their duties under GDPR.

Solidus, in respect of its business purpose, needs to collect and use information from Licensees and their referred clients in order to operate and carry out its function. This information is handled and dealt with properly however it is collected, recorded and used and whether it is held on paper or within computer data records.

CLIENT AUTHORISATION

I hereby instruct Solidus to draft the relevant documentation and I agree to pay the costs even if I fail to complete the planning.

For the purpose of compliance with Data Protection Laws, I consent to Solidus holding my personal details, together with those of my Executors, Trustees and Beneficiaries. These details will only be used by Solidus for the purpose of this planning and will never be sold to or shared with third parties for the purpose of marketing.

Following the completion of this planning, I authorise Solidus or their legal partners to contact me directly if there is a requirement which I, or the Trustees, need to be made aware of.

Print Name

Signature

Date

ADVISER'S CONFIRMATION

As the Financial Adviser to the above Client(s) I understand that I am responsible for the advice, signing and witnessing of the documentation.

I agree to all aspects of the planning being reviewed by Solidus' legal partners if required.

Please prepare the documentation under existing law and I accept Solidus' Terms of Engagement which are available in the Licensee area of their Website.

Sending this application form via email, with or without signature, also constitutes my agreement to the above terms.

Print Name

Signature

Date

Please return this application to:

By post:

Solidus IEP Ltd, Premier House,
1-5 Argyle Way, Stevenage,
SG1 2AD

By email:

applications@solidustrusts.co.uk