

Wills

Basic Guidance

ProTrust 
Estate Planning

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Why see an Expert for your Will?

Everyone knows how important it is to have a Will prepared. A Will is the legal document by which you dispose of your Estate to your chosen beneficiaries on your death.

The reason why it is advisable to see a Wills and Trust specialist, is to have proper and informed advice on the options available to you in the distribution of your Estate. There are matters which simply are not considered by most people when thinking about Wills and it is only through speaking to professionals who have had the experience of dealing with such matters regularly over a number of years that all of the issues and legal traps are carefully and safely navigated.

The person you instruct must make sure that he or she has full knowledge of those alternative options. Instead of a simple Will structure, which may be sufficient for some kinds of circumstance, many people will actually need something more complex in order to cover all of the issues.

Things to consider

Here is a list of the things you will need to consider when making your Will.

- Who to choose as Executors and guardians and what those roles actually involve in practice.
- Inheritance tax planning within the Wills for people with estates in excess of the Inheritance Tax threshold (currently £325,000).
- Protecting your estate from third-party claims or attack on the assets passed to a beneficiary.
- Where estate passes to children, avoiding potential claims from a son-in-law or daughter-in-law on a marriage break-up or from outside parties.
- If you are giving money to charity, how best to structure payments and whether a trust may be suitable.
- Dealing with substitute provisions contained in Wills in the event that your primary beneficiaries die before you.
- Adequately setting out your funeral provisions and wishes.
- Obtaining advice on how your Will would be administered and the current Probate procedures on death.
- Ensuring that the Will is 'claim-proof' in the event of queries on mental capacity or undue influence. (Professionally prepared Wills are unlikely to be challenged, assuming they are correctly drawn up by an experienced advisor.)

Overall, to ensure the correct drawing up of the Will, certifying its validity and ensuring that all the legal necessities as to capacity, knowledge and understanding of what is being carried out are formally covered.

We shall cover all of the above with you as part of our standard Wills service.

Contact Us

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