



UPDATING GUIDANCE

Please read this guidance carefully as these are the most common issues that can delay the updating of Wills. Please do not hesitate to contact our Legal Department on 020 8380 0333 to discuss the changes you wish to make to your Will. We will be happy to advise and assist.

When adding anyone new to your Will, please provide:

- Full name and title
- Relationship to you (eg friend/sister/cousin etc)
- Full address if adding a new Executor/Trustee
- Date of birth of a minor beneficiary (under 18) and the age you would like them to inherit (18/21/25)

When removing anyone from your Will, or if changing the distribution of your estate, please provide:

- A separate signed letter explaining the reasons for this
- If you have not left anything to a member of a 'class' of beneficiaries, a letter explaining the reasons for this (eg if you leave everything to all your brothers and sisters apart from one) please explain the reasons for this in a separate signed letter
- If you leave your estate in unequal shares (eg more to one child than your other children), please explain the reasons for this in a separate signed letter

NB Such documents are required for our files in order to protect your wishes in the event anyone should question your decisions after you have passed away

If adding your first child:

- Please provide the full name, address and relationship of the person you wish to appoint as Guardian
- You may appoint a couple as joint Guardians, however it is not possible to appoint two individuals as 'joint' Guardians. You should appoint the person the child would live with
- Please also state the age at which you would like your child to inherit (minimum 18, maximum 25)

If your children are now 18 and you wish to appoint them as Executors, please bear the following in mind:

- At what age would you like your children to inherit? If it is older than 18 (eg 21 or 25), then they cannot act as Executors/Trustees until they reach that age. You may however lower the age of inheritance to 18 if you wish
- Have you got a 'Total Calamity' provision in your Will (this being if you and all your children have passed away)? If so, you must still appoint alternative Executors/Trustees to administer your estate in this situation

Minors in your Will

If there are any minors in your Will ie anyone under the age of 18, you must appoint a minimum of two Executors/Trustees, so for example if you leave your estate to your minor children and you wish to remove one of your Executors/Trustees, you must provide a replacement Executor/Trustee

All changes must be accompanied by your signature

- If amending your copy Will please write clearly and sign each page to which an amendment has been made
- If informing us of the changes you would like to make in a separate document, this must be signed

Please also send a photocopy of one form of identification e.g driving licence or passport

NB In certain circumstances, we may require further information and/or we may advise a face-to-face appointment with one of our Legal Consultants; this will be assessed once we receive your amendments and a member of our Legal Team will contact you to discuss this.