Is your Will up to date?

Does your Will reflect your current circumstances? If not, then you should consider a Will Review.

When you made the wise decision to arrange a Will, you were obviously concerned that all of your affairs should be in order. Your Will would have reflected your situation at the time and you probably felt great peace of mind when your affairs were settled.

However, as time passes, situations change. Relationships alter, financial situations change and what may have been the case when you made your Will could well be different now.

If you answer yes to any of the following, then you should now review your Will.

Since you made your Will:
- Have you married?
- Have you divorced or separated from your partner?
- Have you been widowed?
- Have any of your family or personal relationships changed?
- Have any of your beneficiaries or Executors died or moved away?
- Do you now have children, or more children than you had before?
- Are the young children you may have had now grown up?
- Have any of your adult children married?
- Do you now have grandchildren?
- Have you acquired property abroad, or a further property in this country, for example, a holiday home?
- Have you made a Will in another country to cover assets abroad?
- Have you inherited a legacy that has substantially increased the value of your estate?
- Has your property increased in value?
- Have you started, bought or sold a business?
- Have you sold your property to move into residential care?

These are just a few examples and of course, other changes may have occurred within your own situation that may result in a necessary change to your Will.

Please see overleaf for further information.

We hope you find this Information Guide helpful but it is only intended to give a brief outline of the topic and should not be relied on as a basis for action. We would be happy to give you more detailed advice based on your individual circumstances.

If you have an enquiry about updating your Will, contact us today to find out how we can help.

We are happy to see clients at our offices.
I think I may need to update my Will—What do I do?

Firstly, we need to ascertain whether your change in circumstances means changes to your Will are necessary.

We offer a free initial discussion so you can talk through your new situation and your existing Will and see if you need to make an appointment with one of our specialists. Once we are aware of the changes required to your Will, we can give you an idea of the costs involved, if an update is necessary.

How do I change my Will?

There are two ways of making an amendment to your Will. The first is by way of a Codicil, a legal document which states the variations to your original Will, and must be signed and witnessed in the same way as your Will. The Codicil is then stored with the original Will. A Codicil is not always appropriate and our specialist will discuss this fully with you before you proceed. It is also worth taking into consideration that, as a Codicil is stored with your original Will, the contents of both will be seen and this may not be desired.

The second way of making a change is to make an entirely New Will. Our information guide, Making a Will? details what is included in our standard service. We can also offer a range of additional services, such as Estate Planning and how to reduce Inheritance Tax, the use of Trusts, and claims against your estate, for example, and would be happy to discuss the additional fees for these services during your appointment.

Will I need to see a Solicitor or can I write to you with my changes?

Whether you decide to proceed with a Codicil or a new Will, in both cases we will need to make an appointment for you with our specialist as it is vital we spend time with you discussing your new situation and giving you the best advice possible. The appointment can be here at our office or, if more convenient for you, in your home (an additional fee is charged for each visit).

The addresses of people mentioned in my Will have changed. Do I need to make a new Will?

Not if these are the only changes you need to make. Sometimes, changes are very simple, such as amendments to the addresses of beneficiaries or any other parties named in your Will, for example. In this case, if your Will is held with us, we simply ask you to confirm the changes in writing, sign and date your letter and send it to us so that we can store it with your Will. We make no charge for this service.

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