

YOUR WILL

	C1	C2
1 Do you have a Will?	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
2 How current is your will? Did you make your Will AFTER any of the following events:		
a) You had your last child	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
b) You separated or divorced	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
c) You married or partnered	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
d) The death of a beneficiary or executor	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>

(These events can affect your Will by either entirely revoking it or invalidating a gift in it. *Time to review and update your Will!*)

PROTECTION FOR YOUR INHERITANCE

3 Does your Will contain trusts for the surviving spouse and children?	Y <input type="checkbox"/> N <input type="checkbox"/>	Y <input type="checkbox"/> N <input type="checkbox"/>
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(Trusts are recommended for vulnerable beneficiaries, tax advantages and asset protection. General Rule of thumb: trusts should be strongly considered in the above situations and generally if you have property/assets over £200,000)

Phone +44 333 800 3161 to make an appointment or
email enquiries@hoxtoncapital.com

4 Do you have any legal document or strategy in addition to your Will to protect against threats to the inheritance?

Y N

Y N

Example 1: you die and your spouse changes the Will to leave your combined inheritance to a new spouse or to their children from a previous relationship. To minimise risk, implement strategies such as gifts at first level, Contracts to make wills, capital protected trusts.

Example 2: your adult child inherits from you and their inheritance is eroded by divorce, bankruptcy or even death, with the effect that your grandchildren miss out. (To minimise risk, consider specially crafted family trusts and so on)

OTHER IMPORTANT DOCUMENTS

5 Do you have:

a) Property & Financial Lasting Power of Attorney

Y N

Y N

b) Health & Welfare Lasting Power of Attorney

Y N

Y N

c) Death benefit nominations for your pensions

Y N

Y N

d) Trust documents for your insurance policies

Y N

Y N

If you answered 'No' to any of the above, then you should review your estate planning documents to ensure that your estate plan will do the job.

Contact Hoxton Capital Management for a consultation. At the end of the first consultation, you will receive our recommendations for your plan and a no obligation fixed fee quote and you are under no obligation to proceed.

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