



## BEFORE WE MEET

Clients often ask what they should bring to their first meeting with us. We want to reassure you that the most important thing is to bring yourselves and not to worry.

However, we shall need to gather quite a lot of information about you and so it can be helpful if you come armed with some essential information – then we can make sure that the time we spend together is most productive for you.

We are required by law to have proof of your identity, so please bring two documents, one with photographic evidence such as a passport or driving licence and a utility bill, bank statement or similar that is not older than 3 months.

If you can gather the information below and bring it with you, it will save time and help us to capture your details accurately. Don't worry if you can't provide all the information that we ask for, simply bring what you can for now.

- Your full name, address, email address, telephone number and date of birth
- The name, address, email address, telephone number and date of birth of your spouse/partner
- Marital status – are you single, married, intending to marry, cohabiting or divorcing?
- Who you wish to appoint as your Executors, with full names and addresses
- Names and dates of birth of your children (please specify any who are stepchildren or adopted)
- Details of guardians for any children under 18 (names, addresses and relationship to you)
- Estimated values of your house, bank accounts, shares etc. Please indicate if they are in joint names and if there is any outstanding mortgage liability
- If you already have a Will, please state who holds it and bring a copy
- If you own or are a majority shareholder in a business, we may need information about this

When we meet we shall go through your choice of Executors, your funeral wishes, gifts, your preferred distribution of your estate and other matters. Please give some thought to these matters before you come. We look forward to meeting you.

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