



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 do 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 also need to see proof of your identity, by law, so please bring two documents such as a passport or driving licence (paper copy too) and a utility bill that is not older than 3 months.

If you can complete 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 complete what you can for now. Have a look round our website at www.phillips-law.co.uk for lots more information.

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?

Your National Insurance number

Names and dates of birth of your children (please specify any who are stepchildren or adopted)

Details of guardians for children under 18 (names, addresses and relationship to you)

Details of your assets (house, bank accounts, shares etc). Please list these and indicate if they are in joint names

Please give details of your liabilities (mortgage, credit cards and any debts)

Approximate value of your property and any outstanding mortgage liability

If you already have a Will, please state who holds it

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.