

Letter of Wishes UK

A non-binding letter accompanying a Will, prepared with reference to the law of England and Wales

1. YOUR DETAILS AND WILL

Full name:

Address:

Date of this letter:

Date of Will this letter relates to:

2. STATUS OF THIS LETTER

This Letter of Wishes is intended to accompany, and to be read alongside, my Will dated as stated above. This letter does not form part of my Will, is not legally binding, and does not alter the legal effect of my Will, which remains governed by the Wills Act 1837. This letter is intended to provide guidance to my executors and, where applicable, my trustees, as to how I would like them to exercise the powers and discretions given to them, but they are not legally obliged to follow it.

3. EXECUTORS AND TRUSTEES

This letter is addressed to my executors/trustees named in my Will:

Additional context for my executors/trustees (if any):

4. PERSONAL ITEMS AND CHATTELS

I would like the following personal items and chattels to pass to the people named below, in addition to or in substitution for any specific gifts of chattels in my Will:

Item 1:

To:

Item 2:

To:

Item 3:

To:

5. GUARDIANSHIP WISHES

If my Will appoints a guardian for my minor children, I would like the guardian(s) to be aware of the following wishes as to my children's upbringing:

Wishes regarding upbringing, education, religion, or other matters:

6. DISCRETIONARY TRUST GUIDANCE

Where my Will creates a discretionary trust, I would like my trustees to have regard to the following guidance when exercising their discretion as to the beneficiaries and the timing and extent of any distributions:

Guidance for trustees:

7. FUNERAL WISHES

I would like my executors to have regard to the following wishes concerning my funeral and the disposal of my remains, which are expressed as wishes only and are not binding on my executors:

Funeral wishes:

8. OTHER WISHES

Any other wishes I would like my executors/trustees to consider:

9. REVIEW OF THIS LETTER

I intend to review this letter from time to time, and any later Letter of Wishes signed by me and clearly relating to the same Will shall supersede this letter to the extent they are inconsistent. This letter should be kept with my Will and brought to the attention of my executors and trustees following my death.

10. SIGNATURE

Signed by me as a true statement of my wishes.

Signature:

Date:

Print Name: