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Myerson **Personal**

A Guide to Making a Will

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A Guide to Making a Will

What is a Will?

A Will is a legal document setting out your wishes as to how your estate is to be distributed on your death.

If you do not make a Will, your assets will be divided in accordance with a set of rules called 'Intestacy' which only considers family members. Close friends, partners and charities may not benefit at all.

Why do I need to make a Will?

A Will is the most important document you will ever make as it disposes of all the wealth you have accumulated during your lifetime and, therefore, it is important to take proper advice.

The best place to start is to gather details of your assets and liabilities as well as your family tree before considering who you would like to provide for.

We can help guide you through this with our Will Questionnaire which sets out the basics of what you will need to make a Will.



What is the process?

Step 1

We will ask you to complete our Will Questionnaire.

Step 2

Then, we will meet with you in person (this can also be done via FaceTime, Zoom or another platform) to discuss your needs and our proposals in more detail, including advice on Inheritance Tax and estate planning.

Step 3

We will open your file, record your instructions and our advice, as well as documenting issues such as mental capacity and undue influence to reduce the possibility of your Will being challenged.

Step 4

A draft will be sent for your approval with our advice. We ensure our Wills are as transparent and clear as possible, but of course, we are happy to discuss any queries you may have.

Step 5

We will arrange a meeting to complete a final review of your Will with you and to execute it. Once signed, we can store your Will and provide you with copies. We can also register your Will with the Law Society recommended Wills Register, Certainty.

How much will it cost?

At Myerson, we provide a bespoke service and advise you on your individual circumstances based on your priorities. We will be able to provide you with an accurate quotation upon receiving your completed Wills Questionnaire, but as a guide, we find that mirror Wills without trust are in the region of £1300 + VAT.

If you require more complicated Wills containing a trust or further advice regarding estate planning or Inheritance Tax mitigation, we find that our charges are from £2500 + VAT.



You're in safe hands!

If you would like further information about how we can help you make a Will, or if you have any questions, please don't hesitate to contact a member of our **Private Client Team** today.

Call: 0161 941 4000

Click: myerson.co.uk

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