

# Logo Here

## You've nearly finished your will. Here's how to make it legal.

Any questions? Email us on [info@sjlegacy.com](mailto:info@sjlegacy.com)

### 1 Read your will and print it in black and white

- Read it carefully and make sure you understand it. If anything is unclear, contact us.
- Staple it securely in the top left corner. You don't need to include this instruction page, but if you do attach it, that's ok – don't try and remove it.

#### Order a printed copy for just £6

You can order a printed copy of your will at any time, in your Legacy account.

### 2 Choose your witnesses

Choose two witnesses to watch you sign your will and sign it themselves.

#### Your witnesses should be:

- Over 18.
- Not a beneficiary in your will.
- Someone you know and trust.
- Not married to a beneficiary.

If you are elderly, recently bereaved or have a terminal, mental or other serious illness, the law recommends asking a medical practitioner, such as a GP, to act as one of your witnesses. This can help to prove you understand what you are signing.

### 3 Get together with your witnesses and sign your will

Get together with both witnesses. Turn to the 'signatures and witnesses' page. Everyone should use a pen. You sign it first, with both witnesses watching. Each

witness should write their details in capital letters and add their signature. If someone makes a mistake, start again if you can, or everyone should write their initials next to the error.

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## **Store your will and let your executors know where it is**

Your will is legal! Do not send your signed will back to us. Store it somewhere safe at home and let your executors know where they can find it. Alternatively, for a small fee, you can store a will with the government's Probate Registry. Search for their details online.

To invite your friends and family to sort their wills too, visit [legacy.com/invite](https://legacy.com/invite)

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## **Logo Here**

# **Last Will And Testament Of -----Name Here---**

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**Has JAMES JOHNSON died?**

Please contact Farewill where we will:

Help you understand what to do next

Provide free guidance on bereavement services, arranging a funeral and dealing with probate

Call: **020 3695 1713**

Email: **[bereavement@farewill.com](mailto:bereavement@farewill.com)**

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# Last Will And Testament Of JAMES JOHNSON

I JAMES JOHNSON born on 28 April 1984 revoke all earlier Wills made by me so far as they relate to my property in the United Kingdom and declare this to be my last Will.

## Preliminary Declarations

- 1 I am married to SIAN JOHNSON.
- 2 This Will relates only to my property in the United Kingdom and does not affect any other property.
- 3 I have the following living children: FIONA JOHNS born on 08 August 2022 and RONNIE JOHNS born on 01 August 2024.
- 4 I wish to be cremated.
- 5 I have included an Appendix to this Will which is not a testamentary document but has been placed with this Will to assist my Trustees in preparing my funeral, finding my financial assets and delivering personal messages I have written to my beneficiaries.

## Executors and Trustees

- 6 I appoint as my executor and trustee SIAN JOHNSON of 9 Offington Lane, Worthing, BN14 9RY.
- 7 In this will the expression 'my Trustees' means my executor or executors and trustee or trustees of this will and any trusts arising under it.

## Guardians

- 8 a If FIONA JOHNS is under 18 and I am the only living parent with parental responsibility at the date of my death I appoint SHAZZA CHAPERS born on 21 August 1960 to be their guardian.
  - b If RONNIE JOHNS is under 18 and I am the only living parent with parental responsibility at the date of my death I appoint SHAZZA CHAPERS born on 21 August 1960 to be their guardian.

## Pets

- 9 a If my pet PINKY is alive and healthy at the date of my death I give them to SHAZZA CHAPERS born on 21 August 1960. If they cannot afford or refuse to accept the responsibilities of, ownership then I give my Trustees the fullest possible discretion to rehome my pet, in a permanent safe and

loving home, as soon as possible.

10 For any other pet that I own at my death then I give my Trustees the fullest possible discretion to rehome them, in a permanent safe and loving home, as soon as possible.

11 If at the date of my death any pet of mine is suffering or beyond reasonable treatment, or where my Trustees are unable to find them a permanent safe and loving home, then I give my Trustees the fullest possible discretion to deal with that pet's welfare as they think fit.

12 I declare that any expenses incurred by my Trustees in relation to the welfare, care, treatment and rehoming of any of my pets will be paid out of my residuary estate.

## **Gifts**

### **Gifts of possessions**

13 I give free of inheritance tax the following:

a To FIONA JOHNS born on 08 August 2022 all my 'books at the date of my death'.

b To RONNIE JOHNS born on 01 August 2024 my 'wedding ring'.

c To SHAZZA CHAPERS born on 21 August 1960 my 'car aa11 1aa'.

14 In giving effect to any gift above, my Trustees shall have the final and binding decisions as to the identity of any items specifically given and as to the nature and extent of any gift.

15 My residuary estate shall pay the costs of delivering any gift to a beneficiary, vesting any gift in a beneficiary, and the upkeep of any gift until delivery or vesting.

16 Any item that fails to pass to a beneficiary will return to my estate to be included in my residuary estate.

### **Gifts of money**

17 I give free of inheritance tax the following:

a £1000 to NSPCC (THE NATIONAL SOCIETY FOR THE PREVENTION OF CRUELTY TO CHILDREN) registered charity number 216401.

18 Any gift of money that fails to pass to a beneficiary will return to my estate to be included in my residuary estate.

## **Residuary estate**

19 I give to my Trustees my estate to hold upon trust to use it to pay my debts funeral and testamentary expenses, legacies and inheritance tax on all property which vests in them and to hold the remainder ('my residuary estate') to divide as follows:

a 100% to SIAN JOHNSON of 9 Offington Lane, Worthing, BN14 9RY but if they die before me to their children who survive me in equal shares.

20 Section 33 Wills Act 1837 shall not apply to my will and descendants of my beneficiaries shall only take a parent's share where my will specifically provides they should.

21 If some shares set out above are exempt from inheritance tax, and other shares are chargeable to inheritance tax, then the non-exempt shares must bear that inheritance tax.

## General Provisions

22 The standard provisions of the Society of Trust and Estate Practitioners (3rd Edition) shall apply.

## Final Declarations

23 I declare that:

1. I am over 18;
2. I am mentally capable of making my own decisions about my will;
3. I am freely and voluntarily making this will;
4. I have considered all those persons I might reasonably be expected to provide for by my will; and
5. I understand this will and approve it as a true reflection of my wishes.

## Signatures and Witnesses

24 This will is signed by me **JAMES JOHNSON** born on **28 April 1984** in the presence of the two witnesses named below who were each present at the same time, and who have each signed this will in my presence.

**Signature of JAMES JOHNSON**

**Date** (DD / MM / YYYY)

**Guidance:** All three of you must be together. Use a pen. It's ok if the writing isn't fully within the boxes.

25 This will was signed by JAMES JOHNSON in the presence of both of us and then by us in their presence.

**1st witness** signature

**1st witness** full name **1st witness** occupation

**1st witness** first line of address **1st witness** postcode

**2nd witness** signature

**2nd witness** full name **2nd witness** occupation

**2nd witness** first line of address **2nd witness** postcode

The rest of this document does not form part of my will.

# Appendix

I have included an Appendix to this Will which is not a testamentary document but has been placed with this Will to assist my Trustees.

## Funeral

**My additional wishes for my funeral are as follows:**

“big party”

## Financial asset details

I have included details of my financial assets to help my Trustees to administer my estate. This list is accurate at the time of writing, though not necessarily exhaustive, and appropriate efforts should still be made to locate additional assets that may not be listed here.

**Property at 9 offington lane, jointly owned, with a mortgage. Bank account(s) with hsbc.**

**Pension plan with aviva.**

**Life insurance policy with legal & general. Shares in invesco.  
money under the mattress.**

## About my choices

I have included an explanation of why I chose to leave certain close family members, partners or people who are financially dependent on me out of my will. My Trustees can choose whether it's absolutely necessary to share this message or not.

“my brother because we fell out”

## Messages

It is my intention that my Trustees deliver the following messages to my intended beneficiaries, either electronically or in hard copy. These personal messages should not be shared with anyone other than the beneficiaries listed, and as a non testamentary document

these messages should be excluded from public availability.

**To FIONA JOHNS - about my gift of 'books at the date of my death':**

“i hope you like them”

**To RONNIE JOHNS - about my gift of 'wedding ring':**

“enjoy”

To SHAZZA CHAPERS - about my gift of 'car aa11 1aa':

“broom broom!”

## Guidance on the General Provisions

Your will contains provisions relating to the responsibilities of your executors and trustees. These provisions are under the heading General Provisions.

At Farewill we include a set of general provisions, that have been professionally drafted and approved by STEP, and are used widely by other professional will writers and solicitors. STEP is the Society of Trust and Estate Practitioners, a global professional association that promotes high professional standards in this area of law.

It's important you understand all of your will, including the STEP provisions.

The will contains a reference to the STEP Standard Provisions (3rd Edition). These provisions give the executors a number of technical and routine provisions and powers to help them to administer the estate properly. The full text of the STEP Standard Provisions is published on the website of STEP at **[www.step.org/public-policy/step-standard-provisions](http://www.step.org/public-policy/step-standard-provisions)**. We can supply you with a printed copy of the provisions.