

WILLS AND TAX PLANNING



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Do you need a will?

1. Do you have children under the age of 18?
2. Do you own your own home?
3. Are you co-habiting and own a home together?
4. Is there someone that you do not wish to inherit from your estate?
5. Are you concerned that your property could be used to pay for care bills in an unfortunate care home situation?
6. Are you concerned that Inheritance Tax (IHT) will be payable on your estate and want to reduce the level of IHT payable by your estate?
7. Do you want Peace of Mind that all of your affairs will be taken care of after you die? If you find that you answered yes to one or more of the questions above then **it is important to make a Will.**

Most people put off making a Will which is an extremely important document. It isn't necessarily a time consuming task, it will only take between 30 – 40 minutes to take your instructions and then normally a further 10 days to complete the draft Will.

What You can Do before visiting us

Before your appointment you should make a list and include the following:

1. Your assets
2. Names and addresses of all those who will be mentioned in your will;
3. Decide who you want to look after your affairs when you are gone
4. Whether you would like to make a gift to anyone in particular a friend, extended family member godchild or even a charity;



5. Who would you like to inherit your estate;
6. If you have young children, you might also want to consider who you would like to act as their guardian.

Estate and Tax Planning

For anyone with property, savings or investments, tax planning might also be a consideration. We can advise on how to limit the amount of Inheritance tax payable on death and well as advise on lifetime estate planning.

Will Storage Facility

For your peace of mind we also offer a free Will storage facility. We will provide you with a copy of your executed Will and a certificate of storage for you and your executors should you choose to provide it to them.

Home Visits

If you are house bound or have serious mobility issues whereby you are unable to attend our office, we can arrange a home visit to give you advice and take your instructions.

We have built good relationships with existing clients, the majority of whom return to us to update their Wills and often recommend our services to their friends and family.



To book an appointment for further information please contact us.

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Our Services

- Commercial Property
- Conveyancing
- Family Law
- Immigration Law
- Litigation
- Shariah Law
- Wills and Probate
- Road Traffic Law
- Application checking service
- Certify Documents
- Commissioners for Oath
- Draft Affidavits
- Same day visa service
- Witness Document

For more information please speak to your Abbey Law contact or go to **<https://www.abbeylaw.org/>**

