

Client Surname		First Names	
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Home Protection Trust prepared by: HPT v0223

Goodwills Legal Services Ltd

Please send completed instruction to:

Goodwills Legal Services Ltd
 3rd Floor, Premier House, Lurke Street,
 Bedford, Bedfordshire MK40 3HU
 Tel: 0845 222 0022 Fax: 0845 222 0023

Notes:

- Please complete in Block Capitals and do not use abbreviations
- Please circle the appropriate options and strike through those that do not apply
- Attach additional sheets if required
- Ensure that the settlor(s) reads the instruction before the declaration is signed
- Ensure that the settlor(s) tick, sign and date on section 6 & sign and date this Legal Instruction on section 7
- Please list the additional documents submitted with this instruction form

Services Included in Instruction

	✓	£		✓	£
HPT One Settlor			HPT Two Settlers		
Land Registry & Search Fee			First Registration Fee		
Home Insurance Quote Required			Storage and Maintenance		

List other Documents Submitted with this instruction:

Fax – Back Required (Instruction Received and Correct)	Yes/No
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Adviser's Name		Firm	
Fee Charged £	:	VAT £	:
		Total £	:

Date Sent to Goodwills Legal Service Limited		Date Received by Goodwills Legal Services Limited	
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Checked By		Date Instructed Law Firm	
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Goodwills Legal Services Limited Reference No.		Date Completed	
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Section 1 – Settlor(s) Personal Details

First Settlor	Title											Second Settlor	Title										
Surname											Surname												
Forename											Forename												
Other Name											Other Name												
Address																							
Postcode					Phone																		
Date of Birth											Date of Birth												
Single / Married / Divorced / Separated / Widowed										Single / Married / Divorced / Separated / Widowed													
Is Settlor(s) in Reasonably Good Health (if 'no' please provide details on notes page)																		Yes/No					
Does Settlor(s) receive any level of community care (if 'yes' please provide details on notes page)																		Yes/No					
Does Settlor(s) have full mental capacity (if 'no' please provide details on notes page)																		Yes/No					
Is Settlor(s) providing instruction (if 'no' then we cannot proceed)																		Yes/No					
Was another person present when instruction was recorded from Settlor(s) – if 'Yes', record details																		Yes/No					
<i>Who else was present - why did they attend and what input did they have in the interview?</i>																							
How many children do you have?					First Settlor					Second Settlor					Joint								
And how many grandchildren?					First Settlor					Second Settlor					Joint								
Are you able to read English?										Yes/No		Are you able to read English?										Yes/No	
Are you able to sign your name?										Yes/No		Are you able to sign your name?										Yes/No	
If you cannot sign, who will sign for you?																							
HMRC Tax Office/Reference Number – Settlor 1																							
NI Number – Settlor 1																							
HMRC Tax Office/Reference Number – Settlor 2																							
NI Number – Settlor 2																							
Has Settlor(s) established other trusts during their lifetime – if 'Yes' then please provide details below																		Yes/No					
Mental capacity check provided by: Name, practice name & address (continues onto next page)																							

If appropriate, state the reasons why all adult children of the Settlor(s) have not been appointed as Trustees and other notes on appointment of Trustees. Use this space for other notes regarding the choice of Trustees.

Section 3 – Estate Valuation (Must be completed)

Asset Description	Testator 1	Testator 2	Joint
Freehold/leasehold Property (to be subject of trust)	£	£	£
Other Property	£	£	£
Investments and Savings	£	£	£
Death in Service	£	£	£
Life Insurance	£	£	£
Other – cars, chattels etc	£	£	£
TOTAL	£	£	£

Are your Life Policies in Trust?	YES / NO	Do you have a Mortgage – if Yes, provide details	YES / NO
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Mortgage Provider:

Account Number:

Estimated Balance Outstanding on Mortgage:

Section 4 – House Insurance

When your house is transferred into the name of the trustees it will be necessary to transfer your home insurance into the joint names of you and your trustees. Goodwills can assist you in doing so by arranging a new insurance policy to commence at the same time as the trust is established and potentially save you money whilst doing so – Do you want Goodwills to provide you with such a home insurance quote? If yes, Please enclose insurance schedule.	YES / NO
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Current Home Insurance Provider	
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Current Level of Cover	
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Expiry Date of Current Policy	
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Premium of Current Policy	
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Notes on Home Insurance:

Section 5 – Title Deeds to Property

Do you have the Title Deeds to your property? (if ‘yes’ please forward them to Goodwills with this instruction – if ‘no’ please provide details below of where they are kept)	YES / NO
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Location of Title Deeds:
Please provide the details of the solicitor, bank or building society holding your title deeds together with any account number as applicable. We will draft and send you a letter of authority for you to sign thereby authorising the release of your Title Deeds to our solicitors.

Name:

Address:

Account Number (if applicable):

Section 6 (a) – Beneficiaries of the Trust

The Settlor(s) will be automatically nominated as beneficiaries of the trust, are the other beneficiaries to be the same as the Settlor(s) Will (if ‘yes’ please attach a copy of Settlor(s) Will	Yes/No
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If NO, or Settlor does not have a valid English Will then please list beneficiaries details below

In Equal Shares (If NO, please specify shares in either percentage or fractions)	YES / NO
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Beneficiary Name	
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Address	
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	Postcode		At Age		Share	
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Relationship to S1		Relationship to S2	
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Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

Beneficiary Name

Address

Postcode **At Age** **Share**

Relationship to S1

Relationship to S2

If necessary, please list additional beneficiaries using an additional sheet and attach it to the rear of this instruction

Section 6 (b) – Substitution of Issue

If a beneficiaries dies prior to benefiting, do you wish their children to benefit? **YES / NO**

If Yes, at what age should the substituted beneficiaries benefit? **(between 18 and 25)**

If NO, is that share to pass to the surviving beneficiaries in equal shares	YES / NO
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If NO, who will benefit from that share?																				
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Relationship to S1	
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Relationship to S2	
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Section 6 (c) – Default Beneficiaries

It is necessary to appoint default beneficiaries who will benefit if all the beneficiaries listed in sections 6a, and 6b die prior to benefiting, a charity is often chosen or more distant relatives, please list below those whom you wish to benefit under these circumstances.	
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Beneficiary Name																						
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Address																						
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Relationship to S1	
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Relationship to S2	
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Beneficiary Name																						
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Address																						
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Relationship to S1	
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Relationship to S2	
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Beneficiary Name																						
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Address																						
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Relationship to S1	
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Relationship to S2	
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Beneficiary Name																						
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Address																						
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Relationship to S1	
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Relationship to S2	
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Beneficiary Name																						
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Address																						
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Relationship to S1	
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Relationship to S2	
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Section 6 (d) – Exclusions

Do you wish to exclude a person from benefiting from the trust who may have a potential claim on your estate (e.g. a spouse, former spouse not remarried, children, co-habitants or a dependent)? – (if ‘yes’ provide details below)	YES / NO
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Details of Person(s) Excluded and brief reasons why:

Section 6 (e) – Disabled/Vulnerable Beneficiaries

Are any of the beneficiaries of the trust mentally or physically disabled or vulnerable persons ? – (if ‘yes’ provide details below)	YES / NO
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Details of Disabled/Vulnerable Person(s) and brief details:

Section 6 (f) Reasons for Trust

<u>Reasons</u>		<u>Client Signature</u>
To ensure that your home passes to the persons you wish to benefit, when you want them to benefit.		
Minimum hassle following your death – as the property will already be placed in trust there will be no need for the beneficiaries to wait for the complicated and time-consuming probate process to be finalised before the property can pass to them.		
Minimum hassle during your lifetime – the control of the property will pass to the trustee(s) and therefore, if you become ill or unable to deal with your own affairs, there will be no costly and time-consuming delay before your trustee(s) can sell your property and purchase another (if required).		
If you have a vulnerable or disabled beneficiary the Trust allows the property to be looked after for their benefit, without passing the control to them.		
Other reasons (please detail)		

Section 7 – Declaration by Settlor(s)

I CONFIRM that I am over 18 years of age and that I am of sound mind and that I have heard these instructions read to me and acknowledge that they represent my intentions as to the establishment of the Goodwills Legal Services Ltd Home Protection Scheme (‘the Trust’).

I UNDERSTAND the information contained in these instructions will be sent by Goodwills Legal Services Ltd to Premier Solicitors Ltd (a Solicitors practice associated with and appointed by Goodwills Legal Services Ltd) for them to establish the Trust and I **FURTHER UNDERSTAND AND HEREBY AUTHORISE** Premier Solicitors Ltd to act on my/our behalf in relation to the establishment of the Trust. I **UNDERSTAND** that in due course Premier Solicitors Ltd will contact me and provide their terms of business regarding the establishment of the Trust.

I UNDERSTAND that advice given by Goodwills Legal Services Ltd is based on their understanding of HMRC practices at the time the advice is given. I **THEREFORE** agree that no person, company or agent of such company responsible for the drafting of the Trust shall be liable if changes in HMRC practices affect any liability to tax or duty.

I UNDERSTAND that the establishment of the Trust is not guaranteed to protect my estate from any future creditors of mine and have been informed of such by Goodwills Legal Services Ltd.

I UNDERSTAND that the advice is based on the information that I have supplied. I **THEREFORE** agree that no person, company or agent of such company responsible for the drafting of the Trust shall be liable if I have withheld or provided inaccurate information relevant to the drafting of the Trust.

THE DATA PROTECTION ACT 2018. The information recorded in this document may be retained physically or electronically for reference purposes and will be held in accordance with the Data Protection Act 2018. The information may also be used by Goodwills Legal Services Ltd and its Appointed Representatives to provide you with the details of services suitable to your requirements and to keep you informed of any changes in legislation and practices. Goodwills Legal Services Ltd will **NEVER** pass your details to any third party unrelated to the establishment of this trust.

SIGNED BY FIRST SETTLOR

SIGNED BY SECOND SETTLOR

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Date	
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Date	
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Land registry fee:

Up to £100,000	£ 40.00
£100,001 - £200,000	£ 60.00
£200,001 - £500,000	£ 80.00
£500,001 - £1,000,000	£120.00
Over £1,000,001	£250.00

Search fee: £ 10.00 (incl. VAT and disb.)

First registration, if necessary, must be quoted for separately – please ring Head Office.

Appropriate Office Notes Relating to the Case: