

Additional Gifts & Legacies



| | | | |
|-------------------|--|----------------------|--|
| Surname(s) | | First Name(s) | |
|-------------------|--|----------------------|--|

Additional Gifts & Legacies Information:

- Please affix this supplementary form to the instruction and tick the appropriate box on front page.
- Please use this form where clients have more intended gifts than spaces available in section 5 of the Will Instruction Form.
- If a gift is made to a charity, please quote the charity number.
- Please ensure relevant descriptions are supplied (i.e. if gifting property please provide the address, if gifting bank account please provide the account number, etc).

| | | | | | | |
|--|------------|-----------|---|-------------------------------|------------|-----------|
| Description: | | | | | | |
| Full Name | | | Full Address | | | |
| | | | | | | |
| Relationship to T1 | | | Relationship to T2 | | | |
| Gift to Pass on Death of (please circle) | T1 | T2 | T1 & T2 | Age to Inherit (18-25) | _____ | |
| If Gifting Money, is it to be Index Linked? (please circle) | Yes | No | Is the Gift Free of Tax? (please circle) | | Yes | No |
| If Gift Fails, is Gift to pass to Issue? (please circle) | Yes | No | If Yes, Age to Inherit (18-25) | | _____ | |

| | | | | | | |
|--|------------|-----------|---|-------------------------------|------------|-----------|
| Description: | | | | | | |
| Full Name | | | Full Address | | | |
| | | | | | | |
| Relationship to T1 | | | Relationship to T2 | | | |
| Gift to Pass on Death of (please circle) | T1 | T2 | T1 & T2 | Age to Inherit (18-25) | _____ | |
| If Gifting Money, is it to be Index Linked? (please circle) | Yes | No | Is the Gift Free of Tax? (please circle) | | Yes | No |
| If Gift Fails, is Gift to pass to Issue? (please circle) | Yes | No | If Yes, Age to Inherit (18-25) | | _____ | |

| | | | | | | |
|--|------------|-----------|---|-------------------------------|------------|-----------|
| Description: | | | | | | |
| Full Name | | | Full Address | | | |
| | | | | | | |
| Relationship to T1 | | | Relationship to T2 | | | |
| Gift to Pass on Death of (please circle) | T1 | T2 | T1 & T2 | Age to Inherit (18-25) | _____ | |
| If Gifting Money, is it to be Index Linked? (please circle) | Yes | No | Is the Gift Free of Tax? (please circle) | | Yes | No |
| If Gift Fails, is Gift to pass to Issue? (please circle) | Yes | No | If Yes, Age to Inherit (18-25) | | _____ | |

| | | | | | | |
|--|------------|-----------|---|-------------------------------|------------|-----------|
| Description: | | | | | | |
| Full Name | | | Full Address | | | |
| | | | | | | |
| Relationship to T1 | | | Relationship to T2 | | | |
| Gift to Pass on Death of (please circle) | T1 | T2 | T1 & T2 | Age to Inherit (18-25) | _____ | |
| If Gifting Money, is it to be Index Linked? (please circle) | Yes | No | Is the Gift Free of Tax? (please circle) | | Yes | No |
| If Gift Fails, is Gift to pass to Issue? (please circle) | Yes | No | If Yes, Age to Inherit (18-25) | | _____ | |