



Letter of Wishes

If you are making a Will you may wish to include a letter of wishes. This is a non-binding letter, written by you, designed to sit alongside your Will. A letter of wishes can be hugely valuable to executors by offering advice and guidance, as well as giving you the opportunity to explain, in your own words, the instructions in your Will and the reasons behind them.

Reasons to include a letter of wishes:

- To posthumously assist and guide your executors and make their role easier.
- It is an easy record to update and amend, without the need to update your Will.
- It can be used as evidence if your Will is challenged after your death.

Every individual's letter of wishes will be very personal and unique to them. Things you may wish to cover in a letter of wishes might include:

- A list of your main assets: bank accounts, life insurance policies, valuable items and their locations
- Who to notify about your death
- Instructions for your funeral
- Advice or instructions for the guardians of your children
- Your reasons behind any gifts to charity or other beneficiaries
- An explanation why certain people have not been included in your Will. This can alleviate any frustration or hurt that may be caused by not understanding the reasons behind your decision.
- Guidance on the location of specific items left in your Will or more detailed information to assist your executors.
- Guidance on the care of pets.

Please note a letter of wishes is not legally binding and should not conflict with any of the instructions set out in your Will.

Please see overleaf for an example of a Letter of Wishes.

Sample Letter of Wishes

To: My Executors, My Family and My Beneficiaries and Any Other Person Whom It May Concern:

I, (name), of (address), wish to state my wishes with respect to certain items of sentimental value, my gifts to charity and my funeral wishes:

This Letter of Wishes does not change or revoke my Will.

I request that the following items be delivered to the individuals or charities indicated below:

Description of Item

Name of Person/Charity to Receive

My Funeral wishes are:

Signature and date: