

Farewill Step-by-Step Guide

- 1) Visit www.farewill.com/carlisle-diocese and click the 'Get started' button.

The screenshot shows the homepage of the Farewill website for Carlisle Diocese. At the top, there is a banner with the Church of England logo and a message: "We're proud to partner with The Church of England to provide your will for free today. Thank you for choosing to write your will with Farewill." Below this is the Farewill logo. The main heading is "Write your will for free". Underneath, it says: "We're here to help you write your will in just 30 minutes. Your free will code 'CARLISLE-DIOCESE' will be automatically applied at check-out." A yellow button labeled "Get started" is circled in red, with a red arrow pointing to it from the right. To the right of the text is an illustration of a person sitting at a desk with a laptop, a potted plant, and a cat. Below the illustration is a link: "▶ Watch our new TV ad". At the bottom left, it says "Over 14,000 reviews | 4.9 on Trustpilot" with a Trustpilot star rating. The browser's address bar shows "farewill.com/carlisle-diocese".

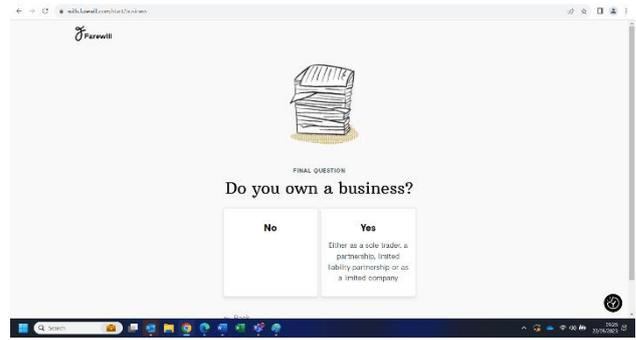
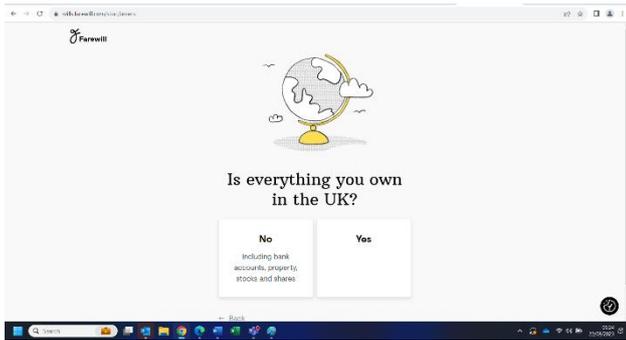
- 2) Answer the step-by-step questions.

This screenshot shows the first step-by-step question: "Do you have a partner?". The question is accompanied by an illustration of a hand holding a pen over a document. There are two buttons: "No" (including separated, divorced or widowed) and "Yes" (including engaged or living with a partner). A "Back" link is at the bottom left.

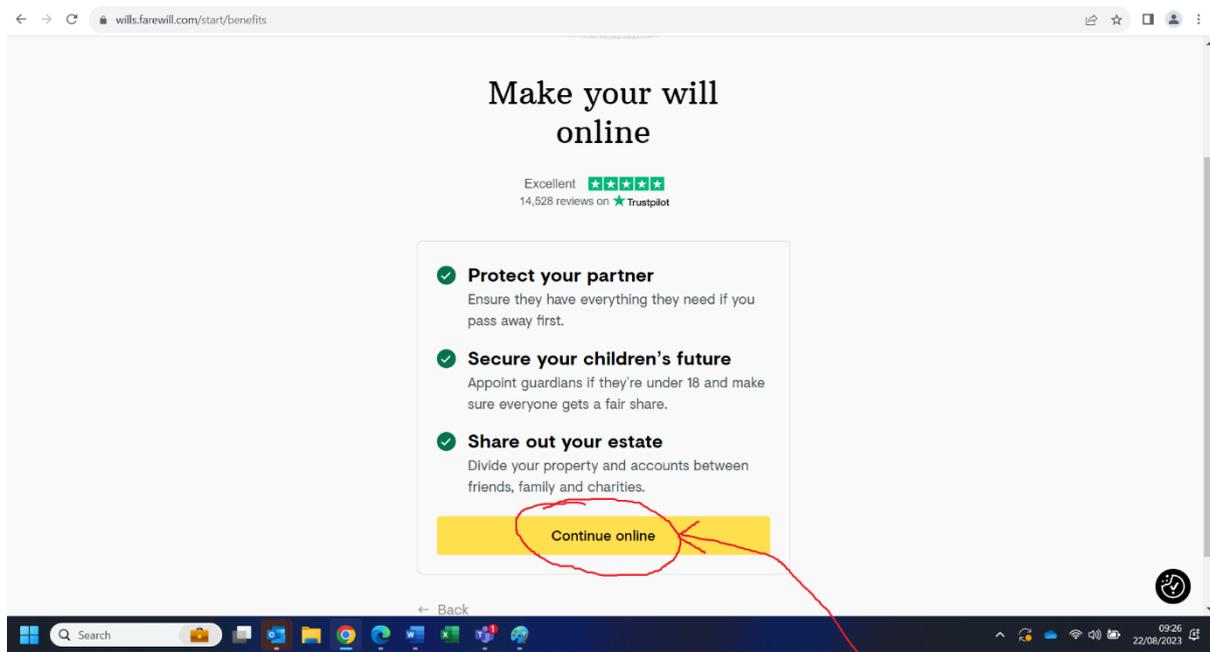
This screenshot shows the second step-by-step question: "Do you have any children?". The question is accompanied by an illustration of a child and a dog. There are two buttons: "No" and "Yes" (including if you only have step children). A "Back" link is at the bottom left.

This screenshot shows the third step-by-step question: "Do you own your home?". The question is accompanied by an illustration of a hand holding a house. There are two buttons: "No" and "Yes" (including with a mortgage or jointly). A "Back" link is at the bottom left.

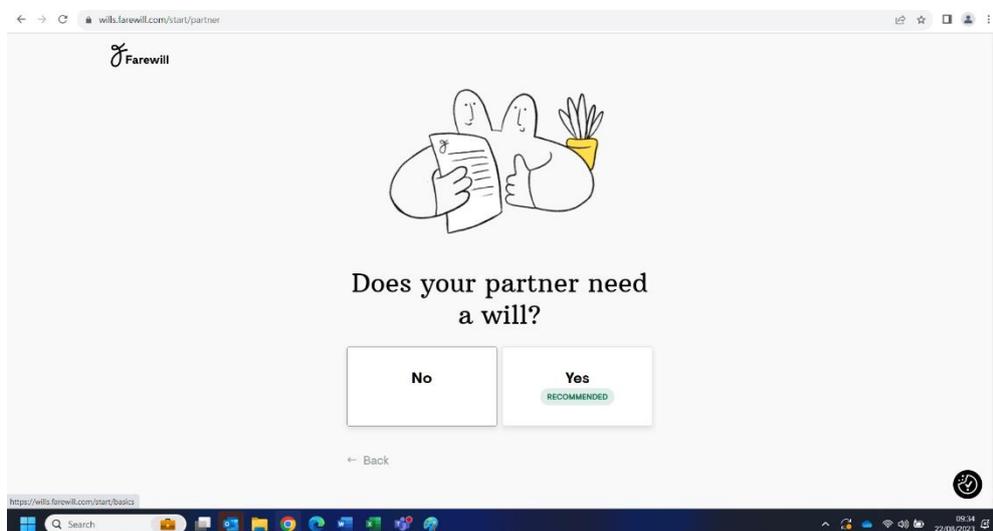
This screenshot shows the fourth step-by-step question: "Do you live in England or Wales?". The question is accompanied by an illustration of a globe. There are two buttons: "No" and "Yes". A "Back" link is at the bottom left.



3) Click 'continue online' to start making your Will.

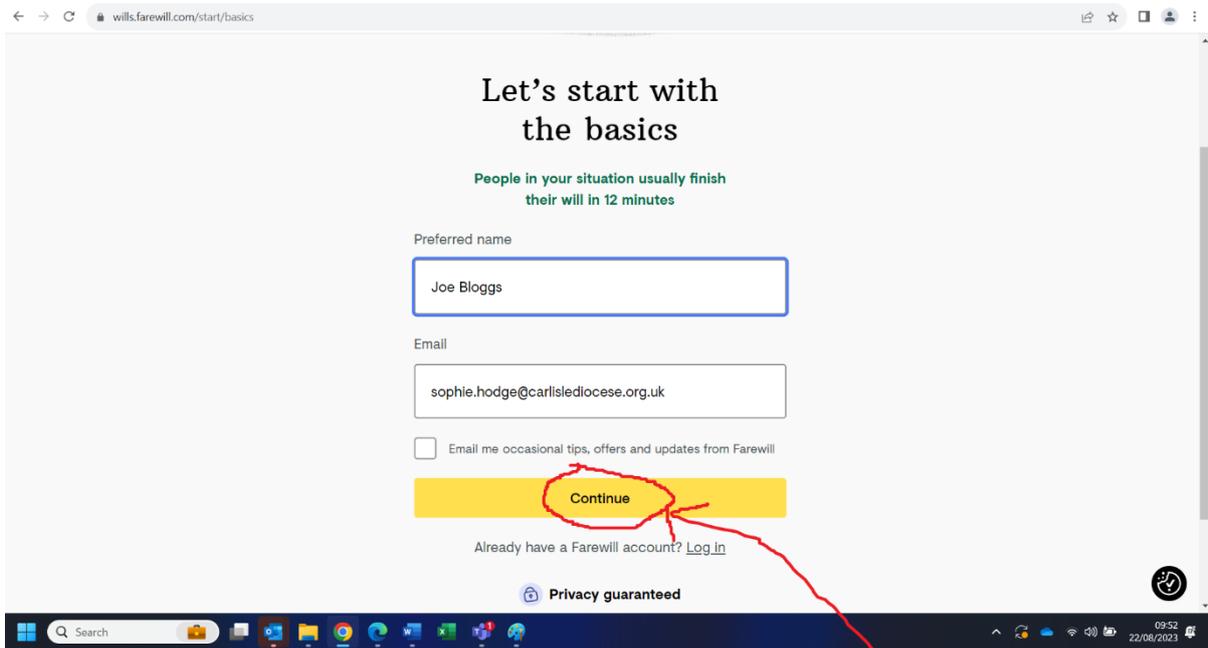


4) If you have answered that you have a partner, you will be asked if your partner also requires a Will. If you click 'yes' you will be able to claim both Wills for free via this Church of England scheme.

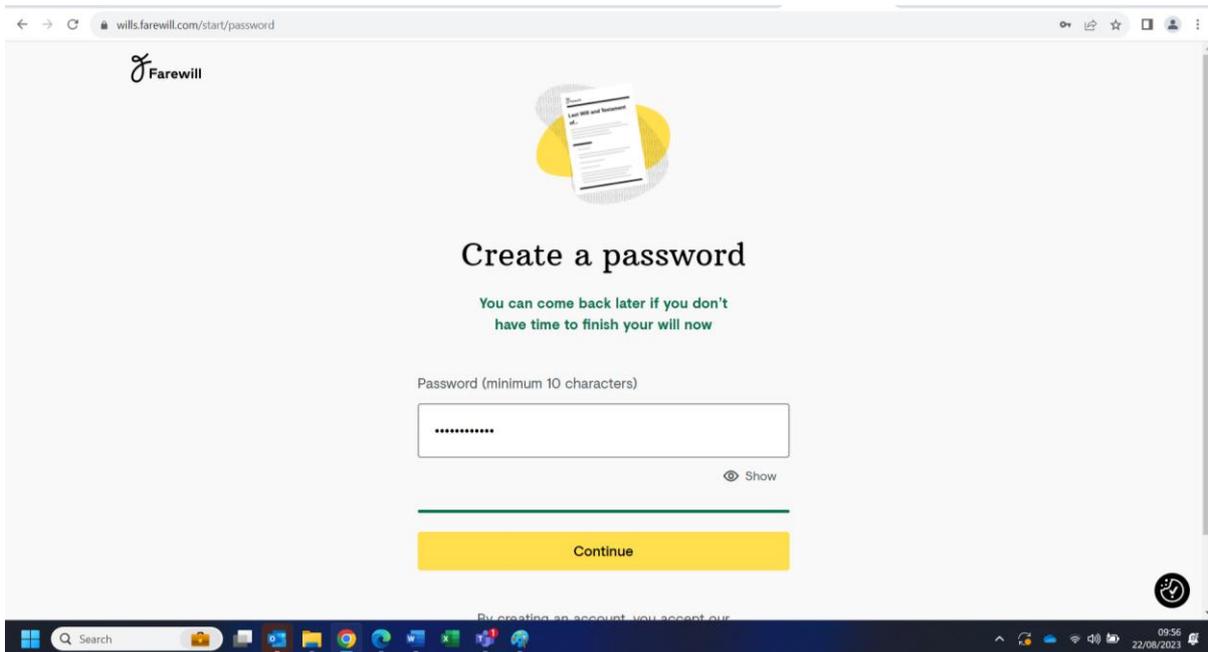


Good news – Farewill predicts it takes on average 12 minutes to complete a Will from here...

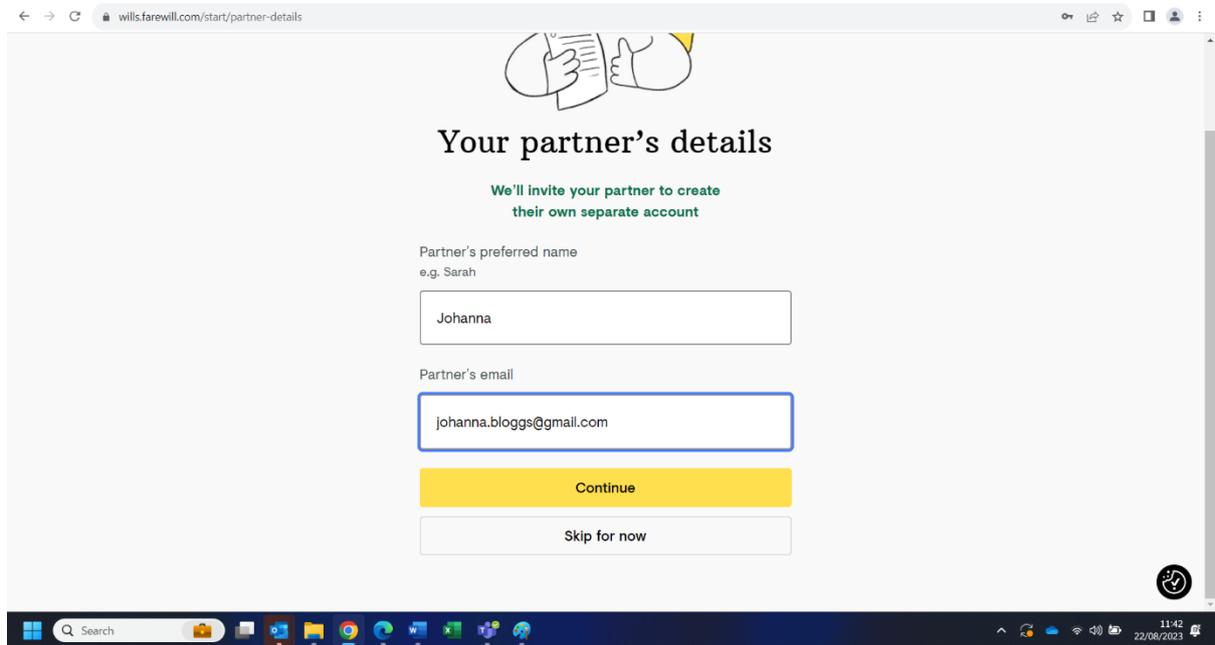
5) Fill in some basic personal details and click continue.



6) You will be asked to create a password. This means you can stop and finish your Will at a later date – you will just need your email address and password to sign back in.

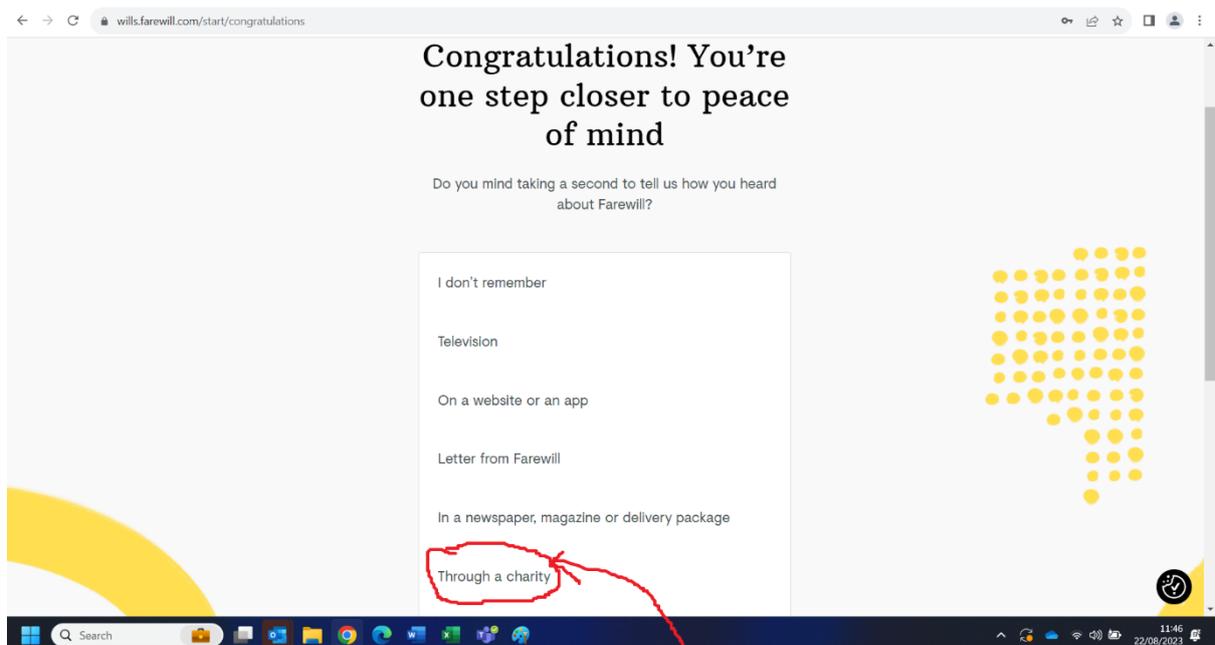


- 7) If you have a partner and stated that you would like them to create a Will too, filling out this screen will enable Farewill to send an invitation via email to them to start their own Will too. If you don't wish to do this, you can click 'skip for now'. Your partner is also entitled to a free Farewill Will. To claim this Will they can either use 'carlisle-diocese' as the voucher code at the end of the process, or they can use the www.farewill.com/carlisle-diocese link instead of the link in the email.



The screenshot shows a web browser window with the URL wills.farewill.com/start/partner-details. The page features a header with a logo of two hands holding a document. Below the logo, the heading reads "Your partner's details". A green message states: "We'll invite your partner to create their own separate account". The form includes two input fields: "Partner's preferred name" (with the example "e.g. Sarah" and the input "Johanna") and "Partner's email" (with the input "johanna.bloggs@gmail.com"). At the bottom of the form are two buttons: a yellow "Continue" button and a white "Skip for now" button. The browser's taskbar at the bottom shows the time as 11:42 on 22/08/2023.

- 8) Farewill will ask you how you heard about this service. You may wish to select 'through a charity'.



The screenshot shows a web browser window with the URL wills.farewill.com/start/congratulations. The page features a heading "Congratulations! You're one step closer to peace of mind" and a sub-heading "Do you mind taking a second to tell us how you heard about Farewill?". A list of options is provided in a white box: "I don't remember", "Television", "On a website or an app", "Letter from Farewill", "In a newspaper, magazine or delivery package", and "Through a charity". The "Through a charity" option is circled in red with a red arrow pointing to it. To the right of the list is a decorative graphic of yellow dots. The browser's taskbar at the bottom shows the time as 11:46 on 22/08/2023.

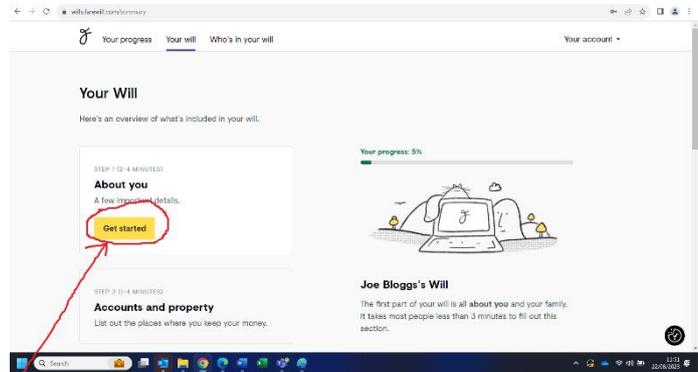
- 9) There are 4 steps left to completing your Will. They are:
- About you
 - Accounts and Property

- Your estate
- Executors

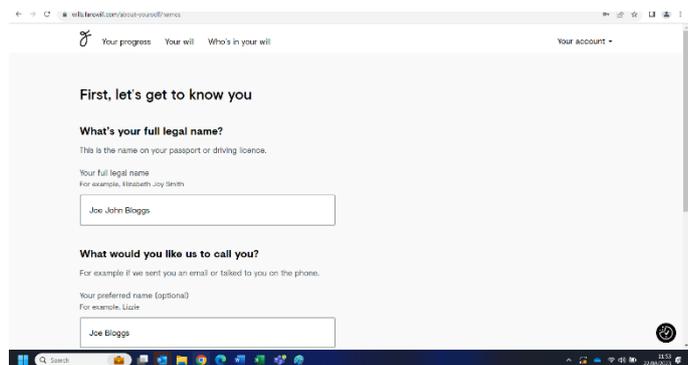
Farewill will take you through each of these in turn. You may wish to check you have all the information you need before you start, by referring to the 'preassemble check list'.

About You

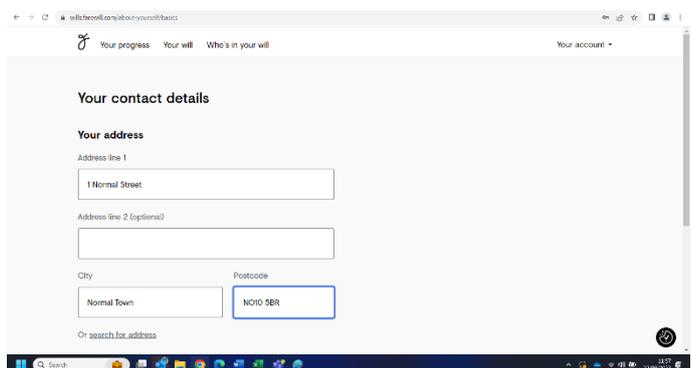
Click the 'Get started' button to begin.



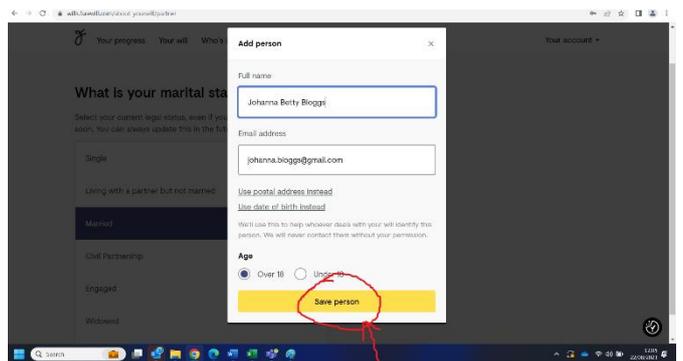
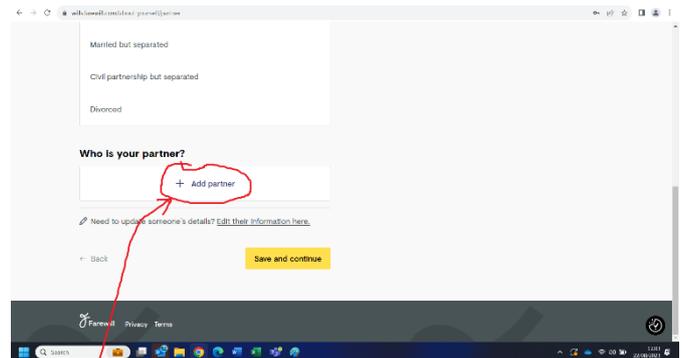
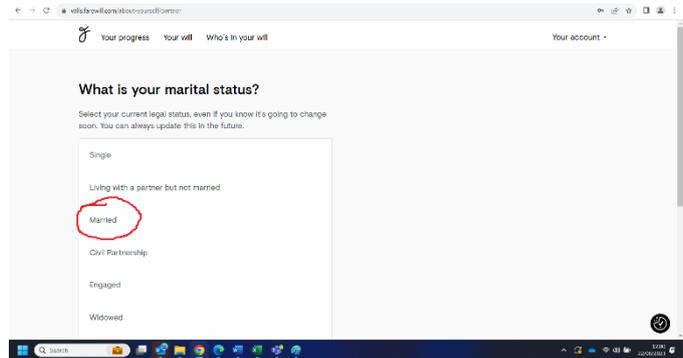
- 10) You will be asked for some basic personal information including your 'full legal name' (as it appears on your passport/driving license), and your date of birth.



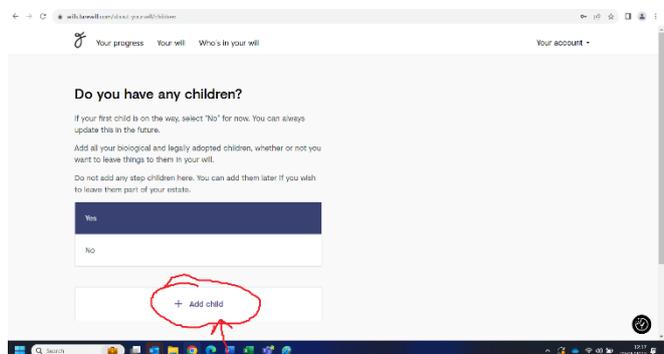
- 11) You will be asked for your address and phone number (the phone number is optional and will only be used for Farewill to phone you to provide support with the Will writing). Your address should automatically appear as you start typing it. If you can't find it, click 'type manually' to fill it in. Click 'Save and continue' once you have completed the page.

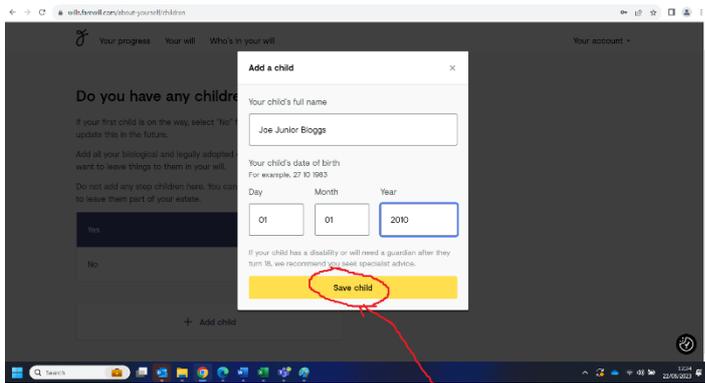


12) You will be asked for your legal marital status. Click which ever option applies. On the same page, if you have a partner, you will be asked to add your partner's details.



13) Next, you will be asked about any children you might have. This includes biological and adopted children but not children you are pregnant with or stepchildren. You will have the opportunity to add stepchildren into your Will at a later stage.

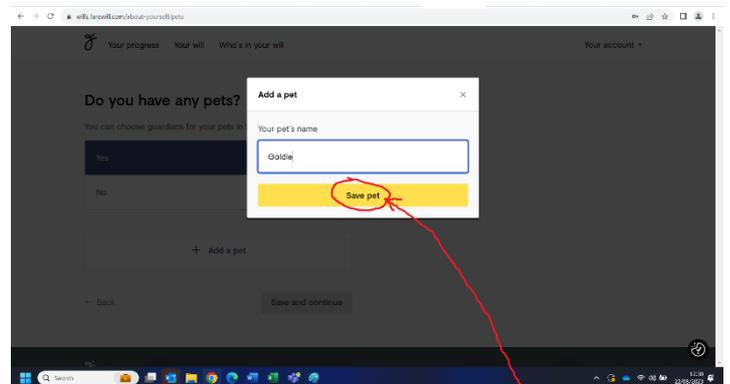
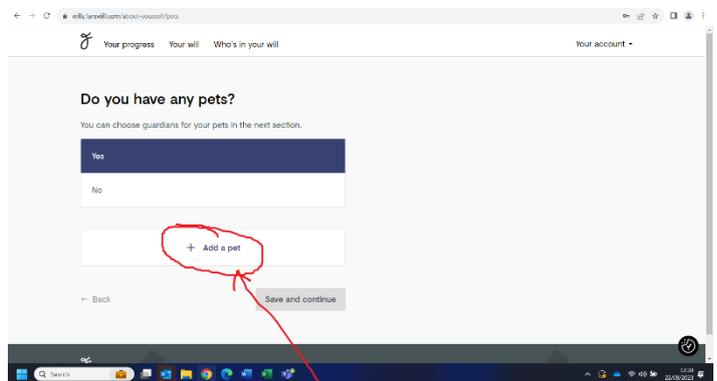




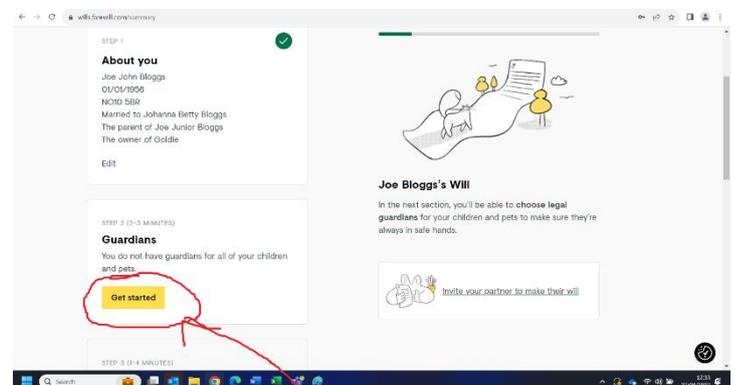
Children you are expecting will need an update to the Will after they are born. You can do this by opting at the check-out to pay £10 a year for the ability to update your Will (you can stop this subscription at any time) or you will need to write a new Will after the child is born.

Once you have added all your children click 'save and continue'.

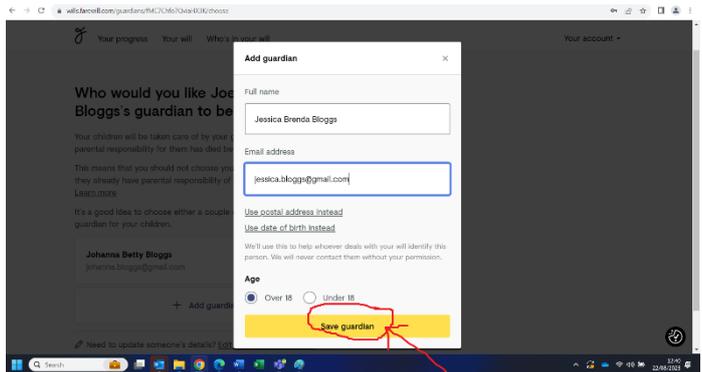
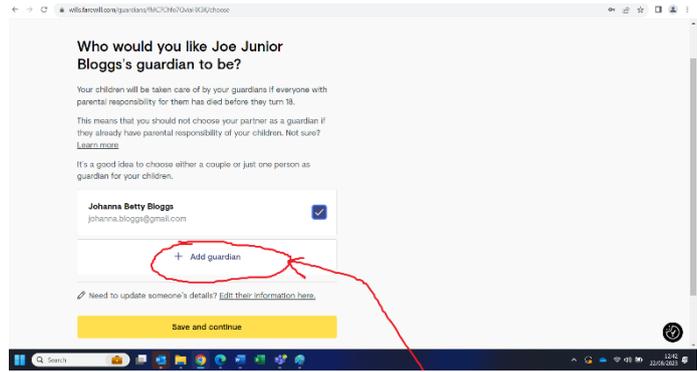
14) Next you will be able to state if you have any pets. This is so your Will can appoint guardians to look after your pets after your death. Click 'save and continue' once all your pets are added.



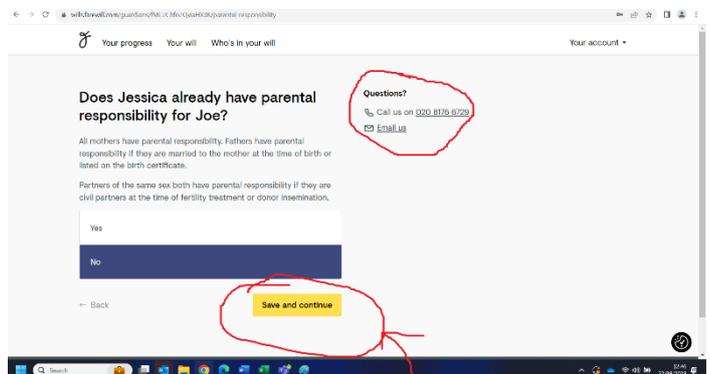
15) If you have children or pets, you will be asked to fill out who you wish their guardians to be after your death.



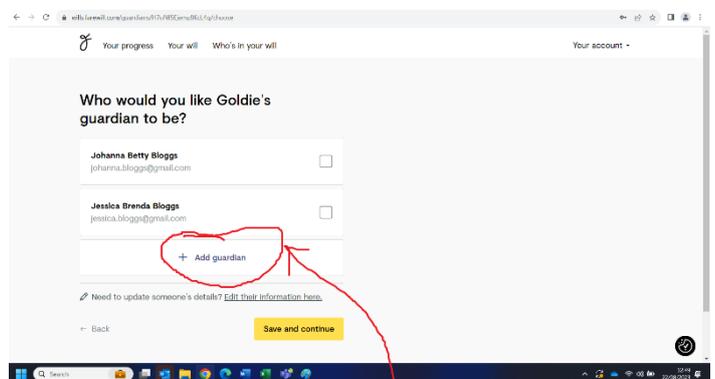
16) First you will be asked about guardians for your children. You can choose an individual or a couple. You do not need to choose your partner (assuming they also have parental responsibility for your children) as guardians are only appointed if both parents die before the child reaches 18.

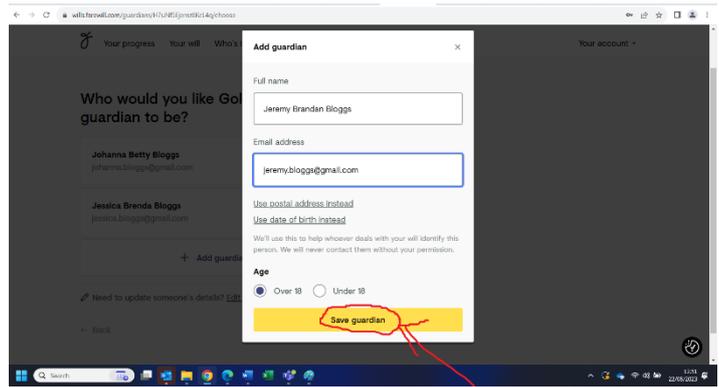


17) You will be asked if the guardian already has parental responsibility for the child. The answer to this question will usually be 'no'. If you are in doubt phone or email the Farewill helpline (details listed on this page). Click 'save and continue'.



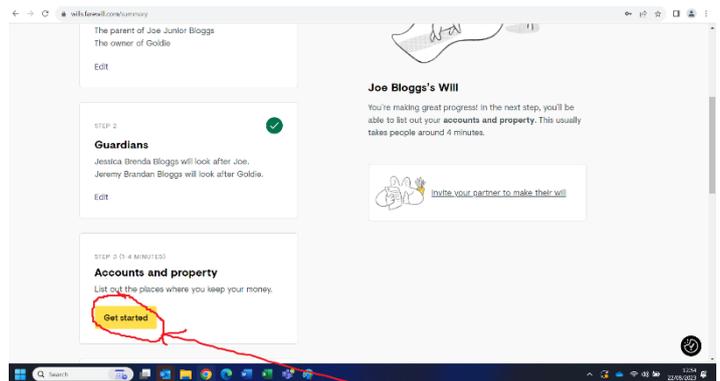
18) You will then be asked to appoint a guardian for your pets. Click 'save and continue' when you are done.



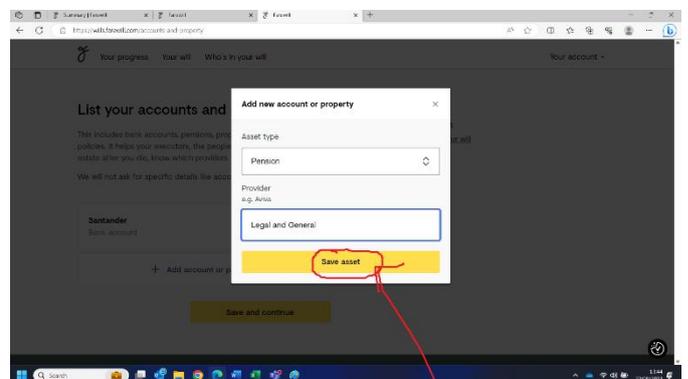
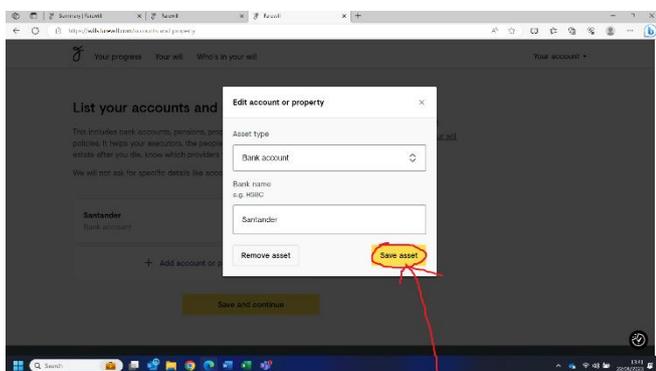
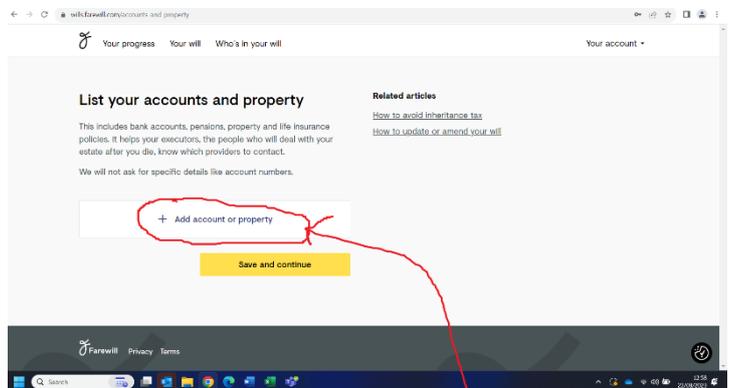


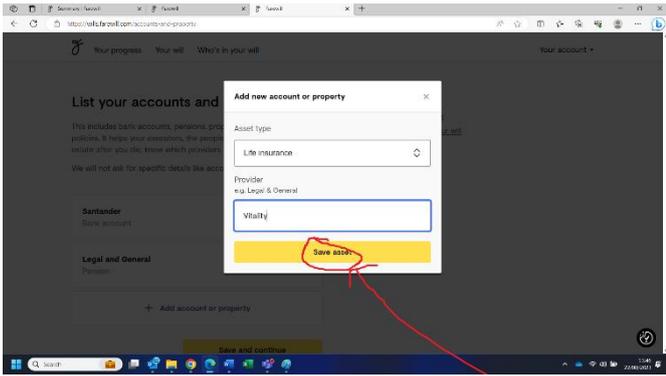
Accounts and Property

- 19) You will now be asked to go to section 2: 'Accounts and Property'. Click 'get started' to begin.

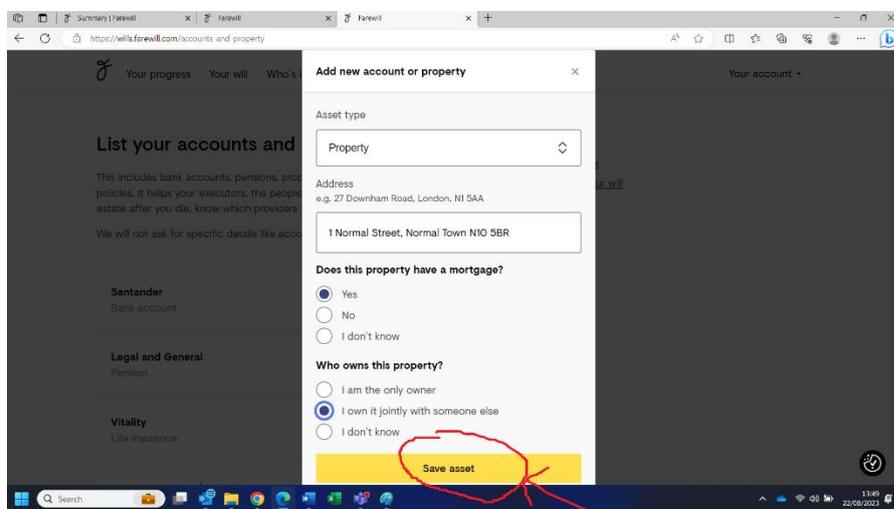


- 20) This is the place where you list your bank accounts, pensions, property and life insurance policies. You do not need specific details such as bank account numbers or policy details (just the name of the provider).





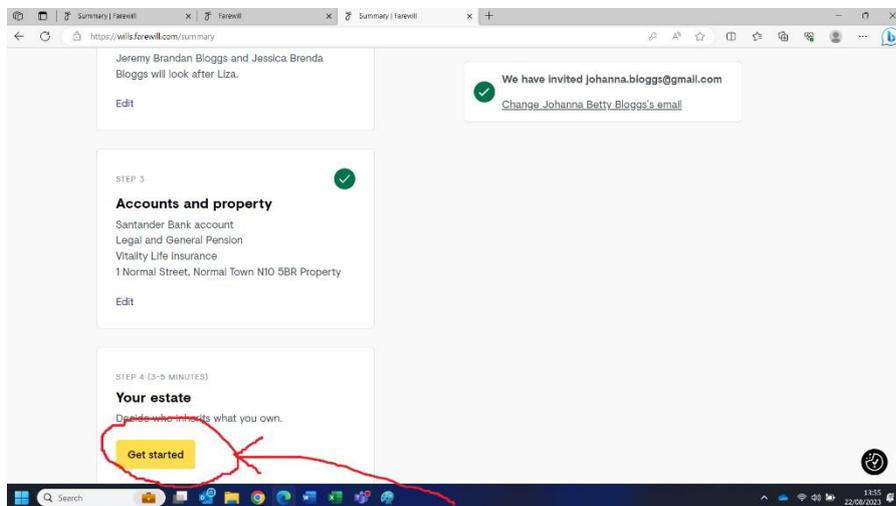
21) When you come to list any properties to own, you will be asked for a few more details such as the address, whether the property has a mortgage and whether you own the property with anyone (you do not need any mortgage details).



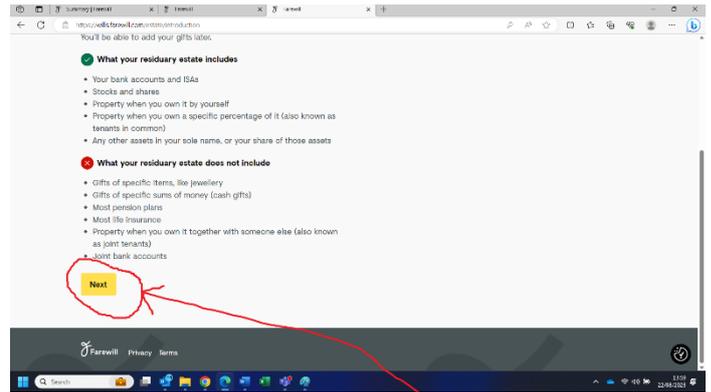
Once you have listed all your accounts and property, please click save.

Your Estate

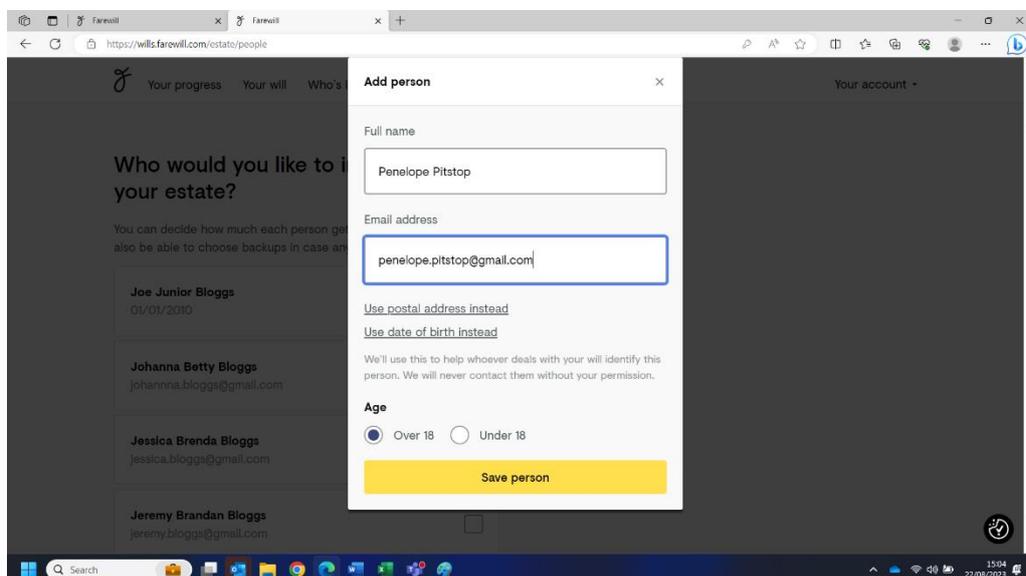
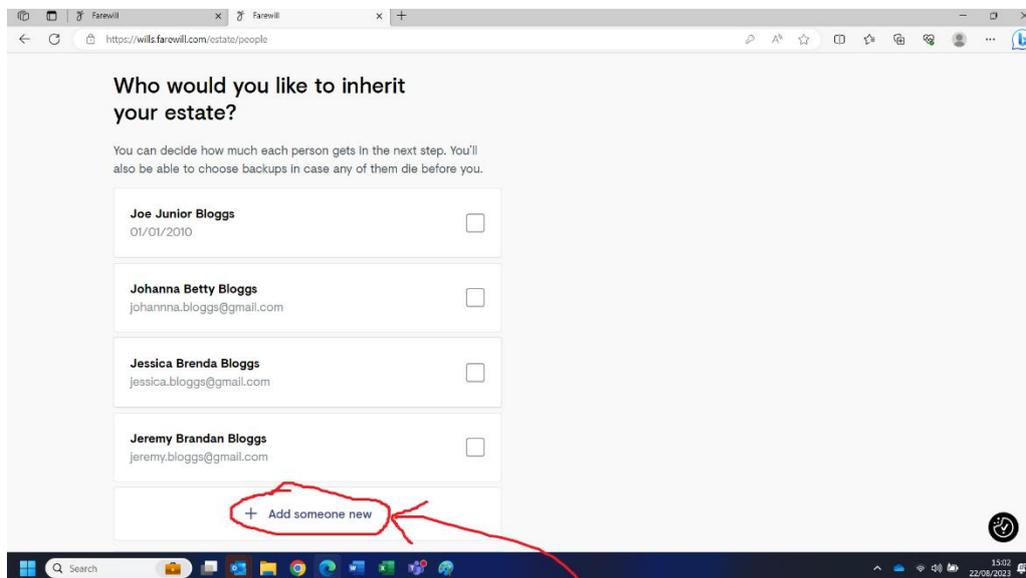
22) In this section you will decide who inherits what you own after your death.



23) You will be given some basic information on what your residuary estate includes. Once you have read the information, click 'next'.

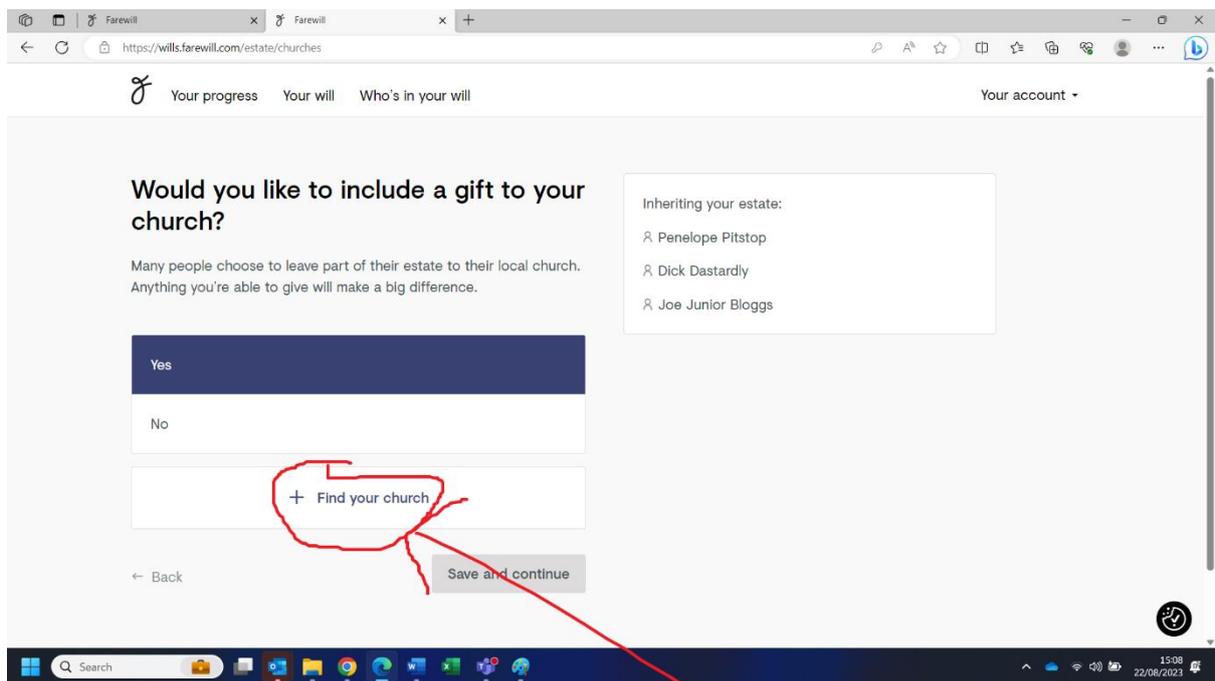


24) You are now able to select who you would like to benefit from your estate after your death. You can select people already mentioned in your Will (i.e. children and guardians) and add new people into your Will as beneficiaries (e.g. stepchildren, extended family and friends). To add new beneficiaries into your Will click the 'add someone new' button.

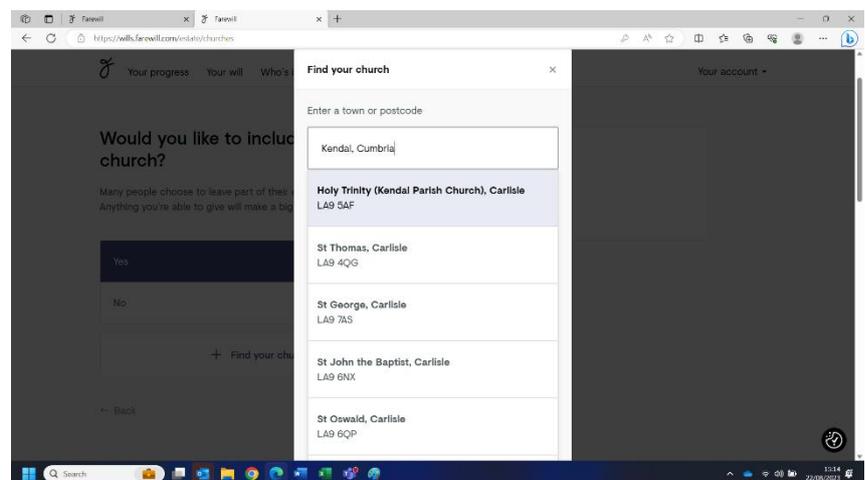


If you are married or in a civil partnership you may wish to consider leaving your entire estate to your partner. In this scenario your estate would be entirely free of inheritance tax and your tax free allowance would be passed onto your partner, doubling their allowance upon their death (read [How to avoid inheritance tax | 5 ways to reduce UK IHT \(farewill.com\)](#) for more details). You can specify later in the Farwill process who you would like to inherit your estate if your partner was to die before you. Your partner may wish to make a Will along the same lines.

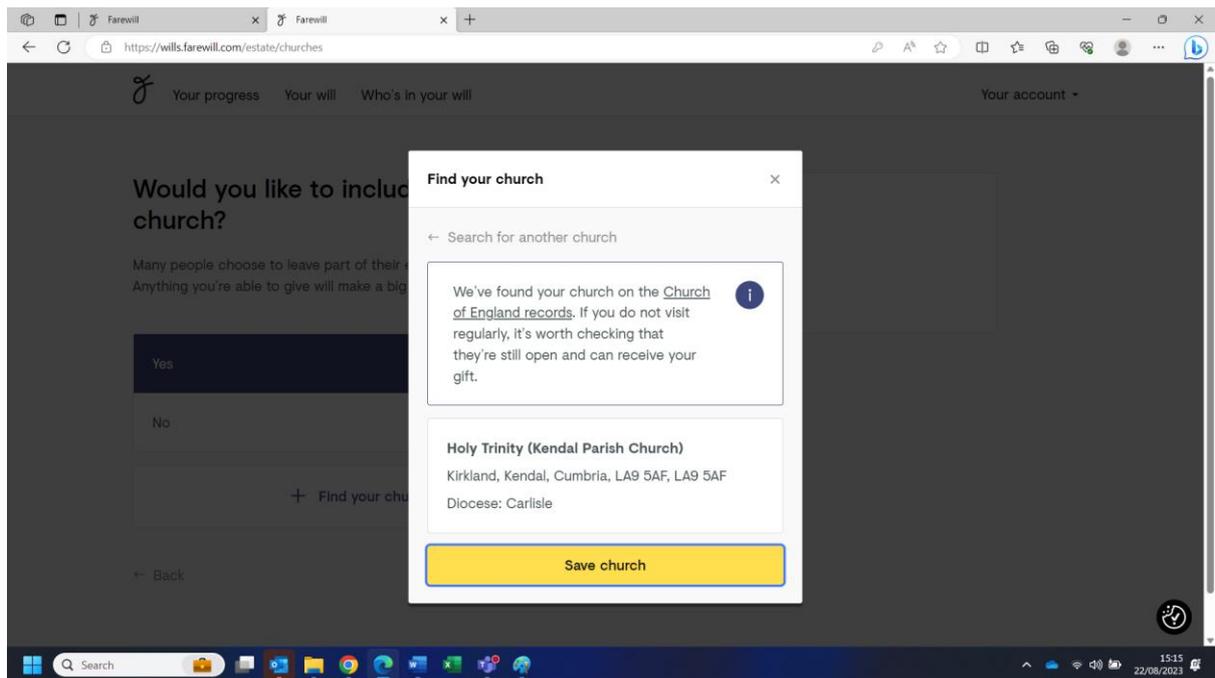
25) Including a gift to your church. Once you have selected those who will benefit from your estate, you will be asked if you would like to include a small gift to your local church. There is no obligation to do so in order to make use of this service, but any gift you feel able to make will be gratefully received. If you select 'yes' you will then be able to press the 'find our church' button.



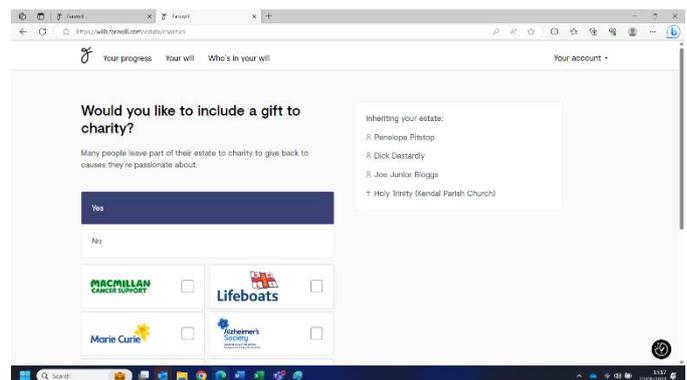
26) You will be asked to fill in the town or postcode for your church and you will be presented with a list of churches, from which you can select the right one. Please note, all churches have 'Carlisle' written after them. This does not refer to the city of Carlisle but to the Diocese of Carlisle.



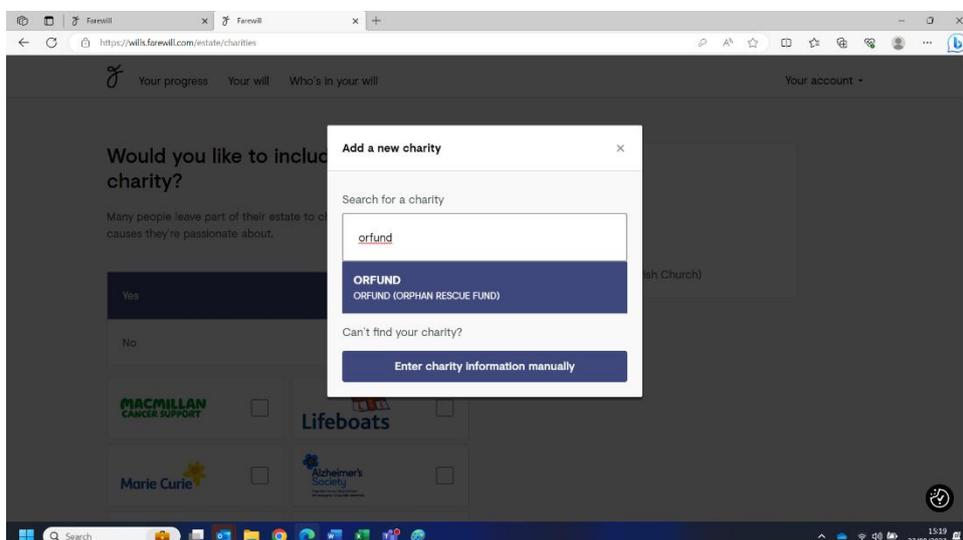
You can then confirm that the details of your church are correct by clicking 'save church'.



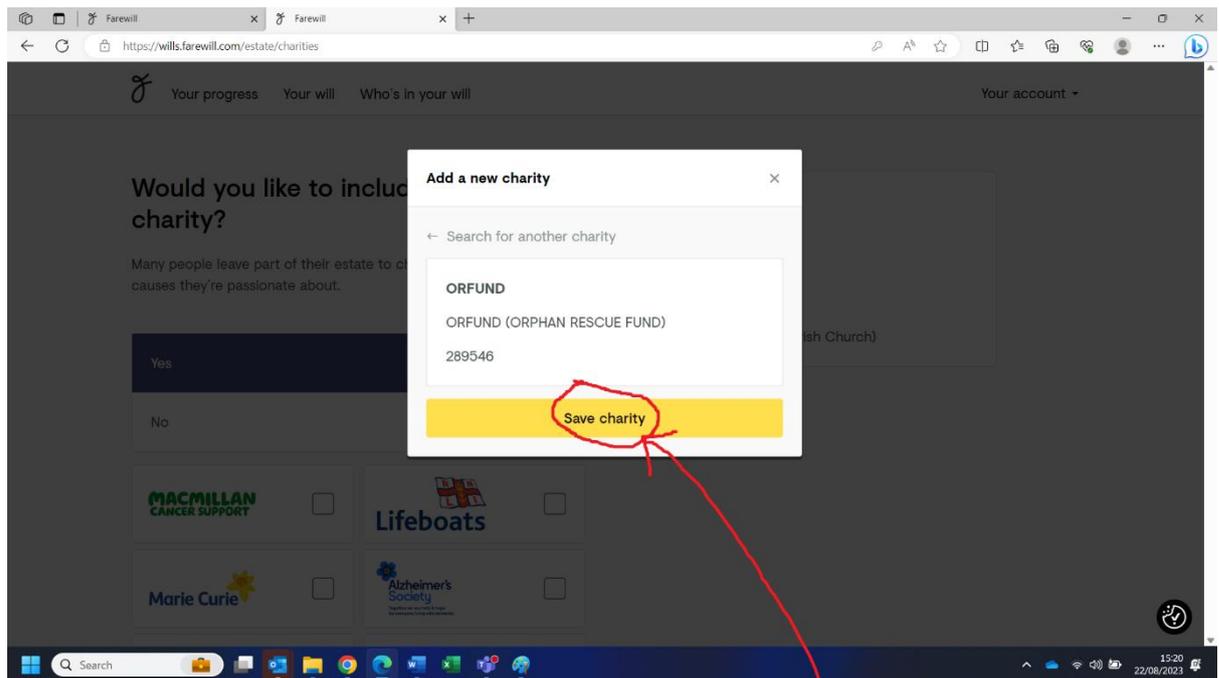
27) You will then be asked if you would like to include a gift to a charity in your Will. You can select from their suggested charities or 'add your own charity' if there is a particular charity you feel passionately about.



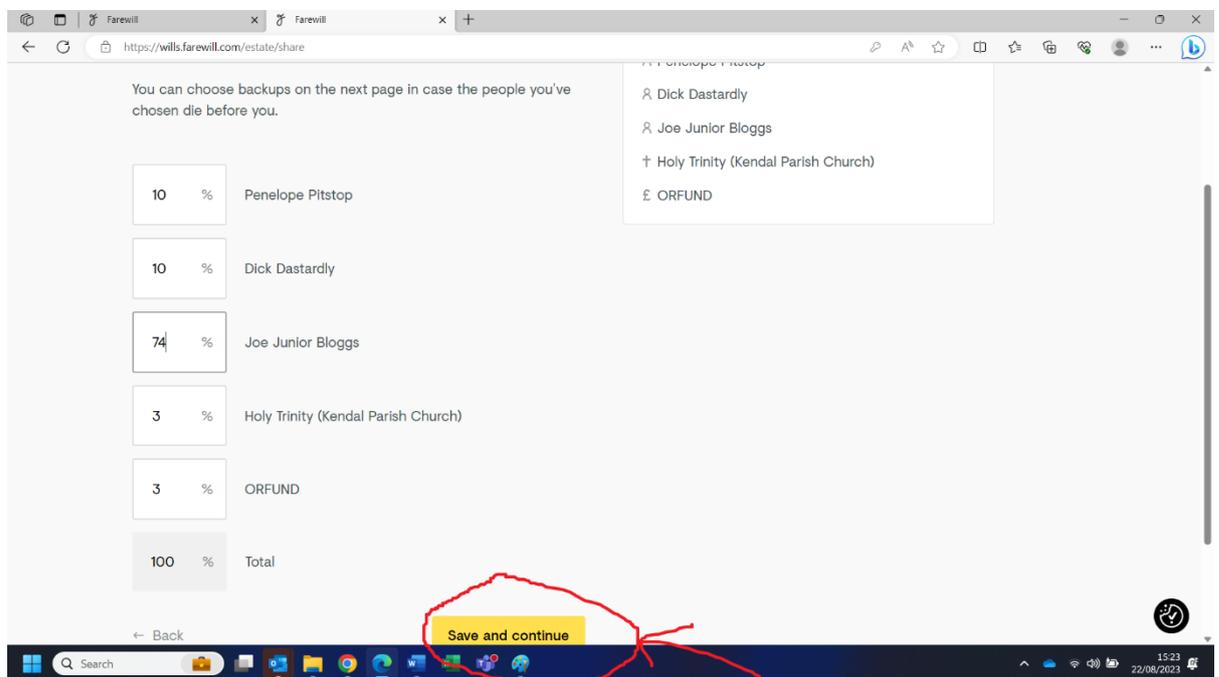
Charities can be found by clicking the 'add your own charity' button and then starting to type the charity name. There is no need to know the registered charity number or any other specific details.



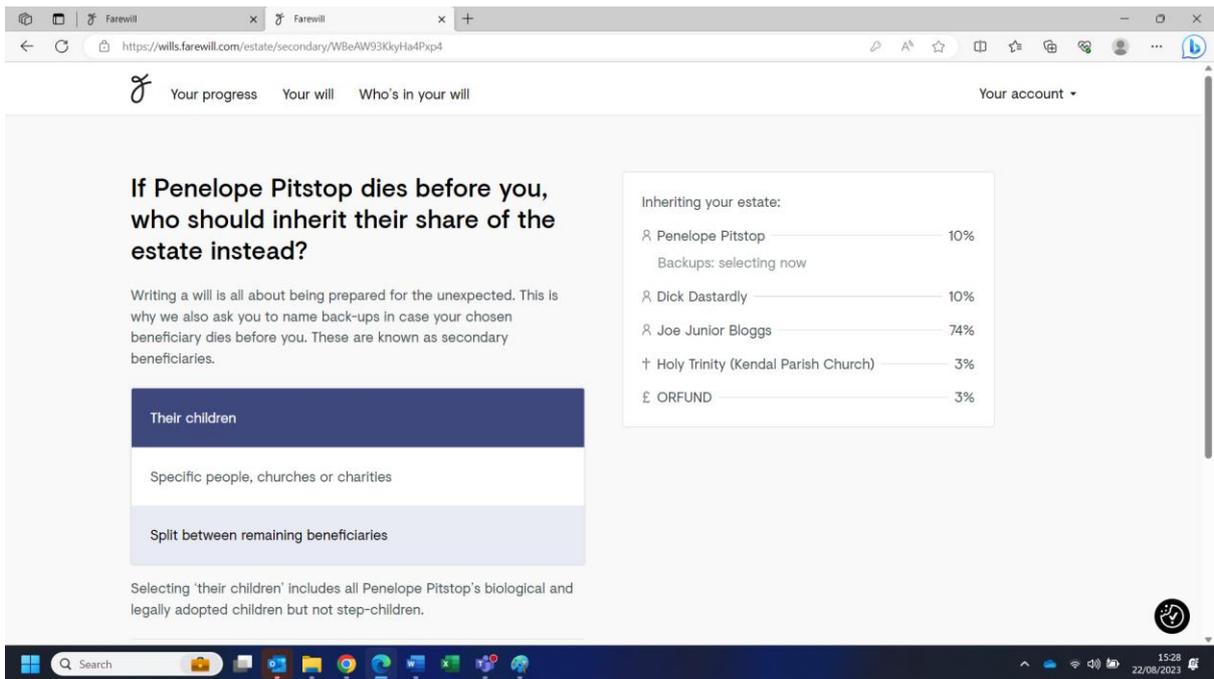
There is then an opportunity to confirm you have the right charity selected.



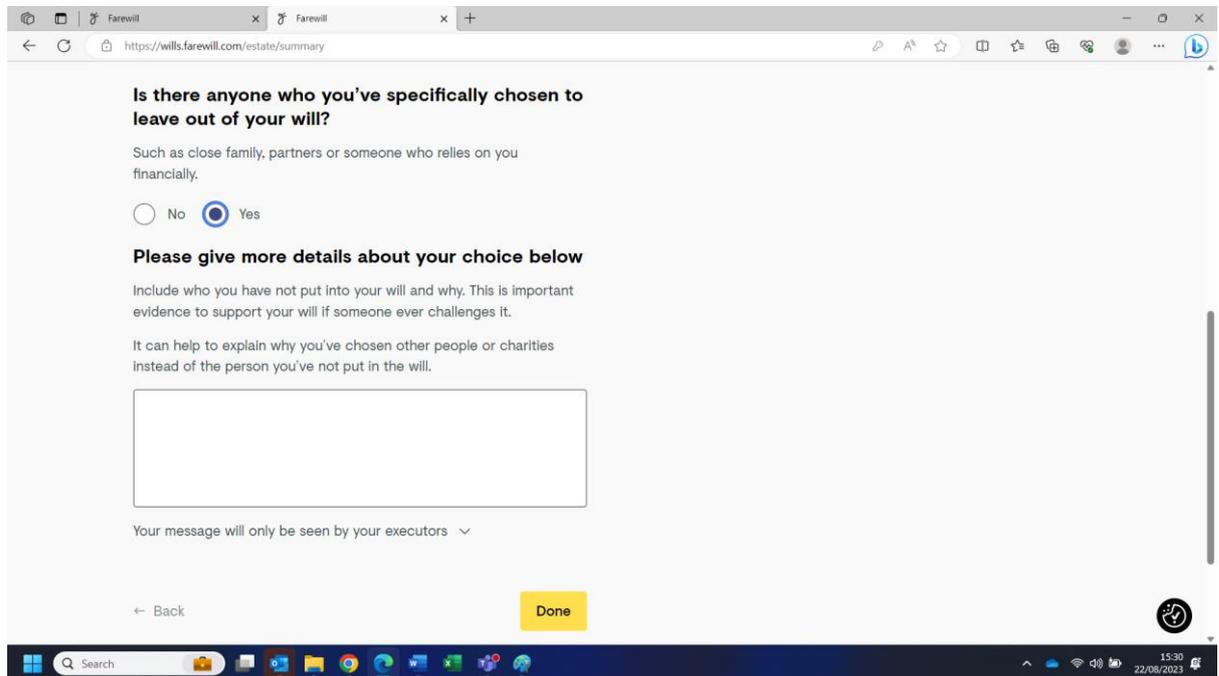
28) You are asked how you would like to divide your estate between your beneficiaries. Farewill will make sure the totals equal 100%.



29) You will then be asked what you would like to happen if the beneficiary dies before you. You could select their children to be the new beneficiary(ies); a different person, church or charity to become the beneficiary; or for their share to be split between the remaining beneficiaries.

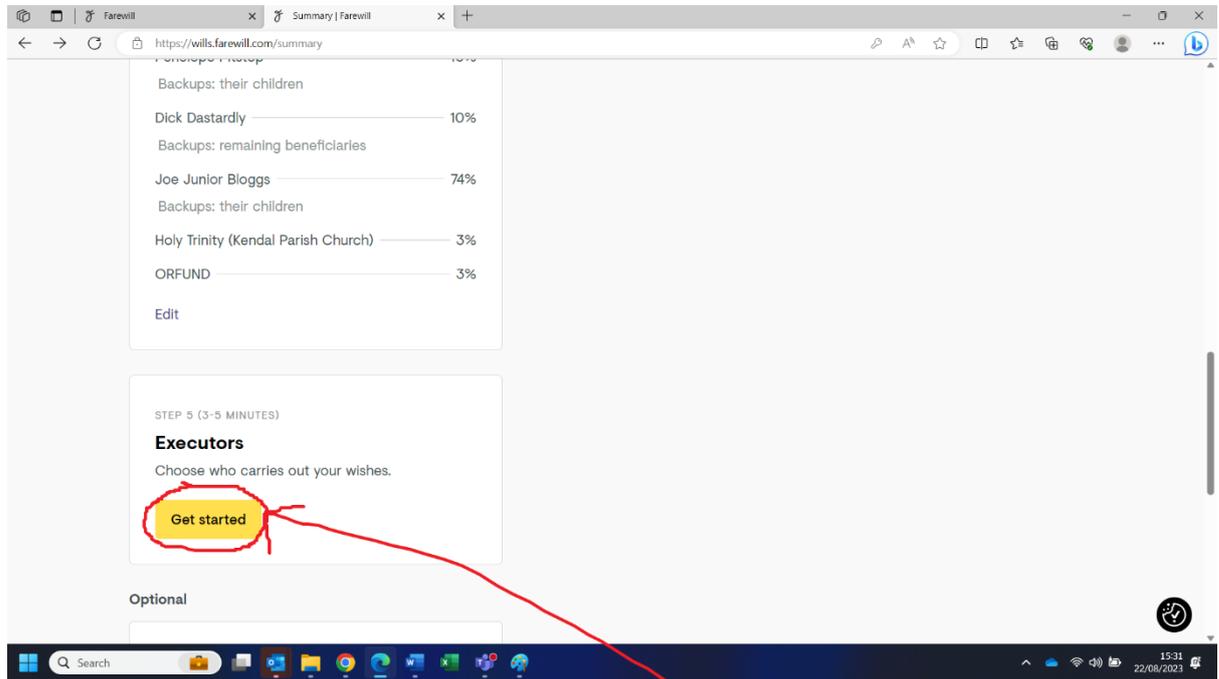


30) Finally, you will be asked if there is anyone you are specifically choosing to leave out of your Will. You will have the opportunity to explain your reasons in a text box, which could be important if anyone ever challenges the Will. No one will see this information other than the executor.



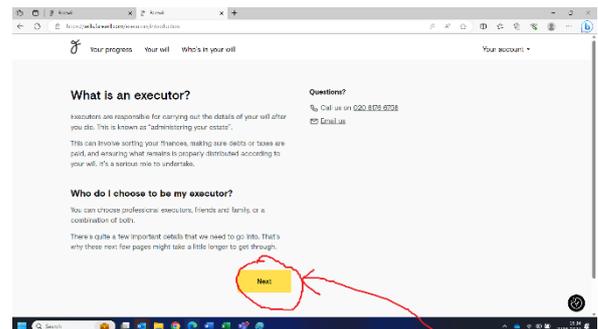
Executors

31) To start this fourth and final section click 'get started':

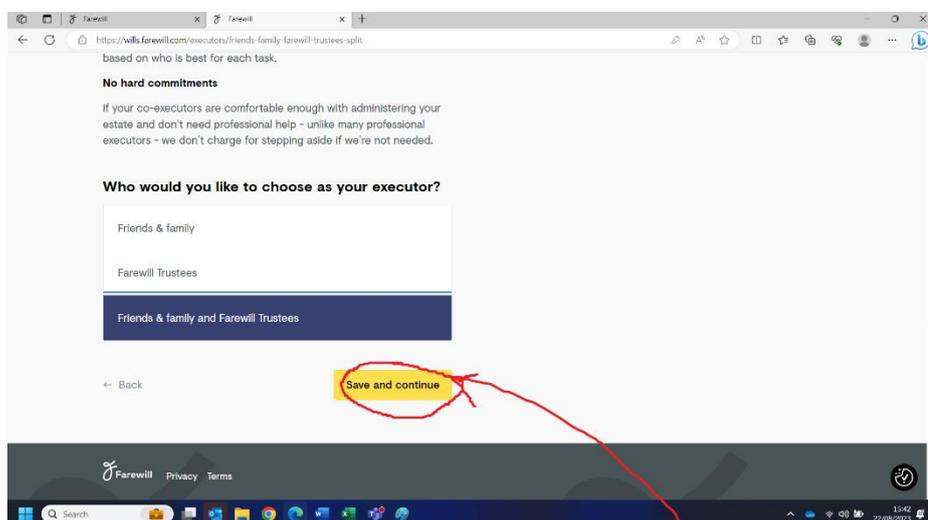


There is a brief information page explaining what an executor is. Once you have read it click 'next'.

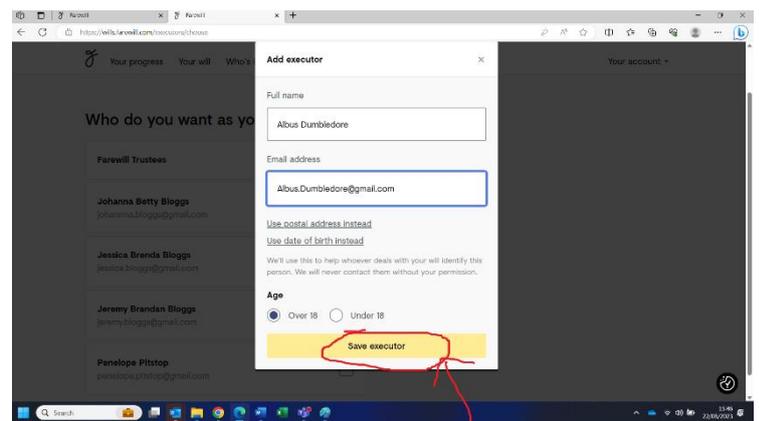
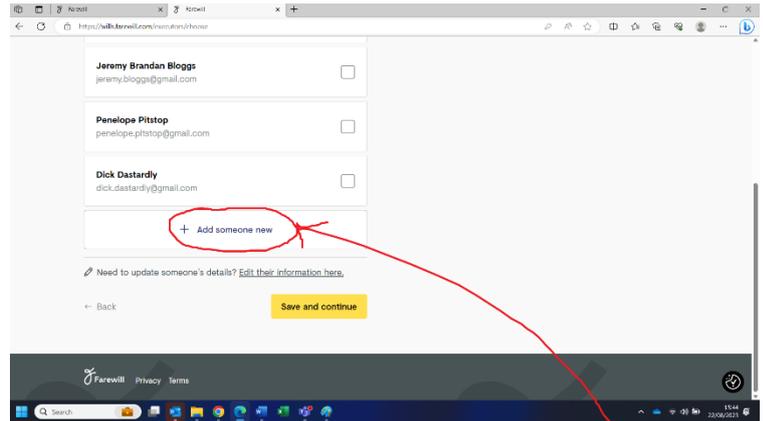
There is then another information page outlining typical fees for a professional executor. Once you have read the information click 'Next, choose executors'.



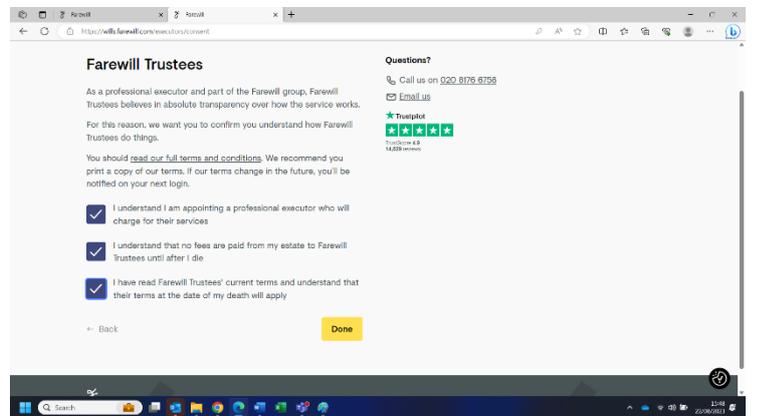
32) You are then asked to select the type of executor you would like to select, e.g. friends & family or Farewill Trustee. If you would like to use a solicitor as your executor you will need to select 'Friends & Family'. Either your friends or family can then instruct a solicitor upon your death, or you can put solicitor details into the friends & family section.



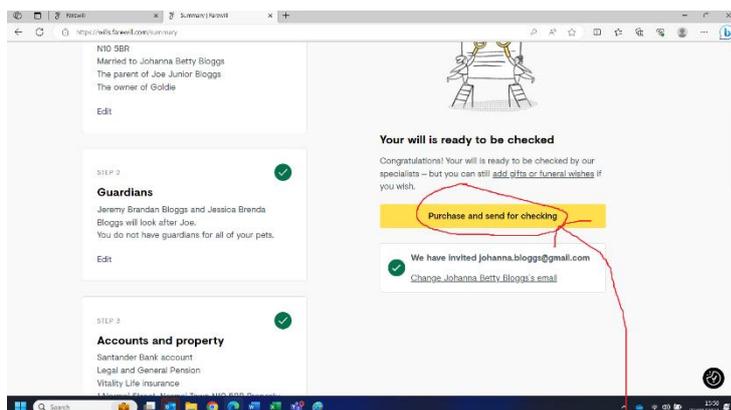
33) If choosing friends/family to be your executors, you will again have the opportunity to add their name onto Farewill if they are not there already.



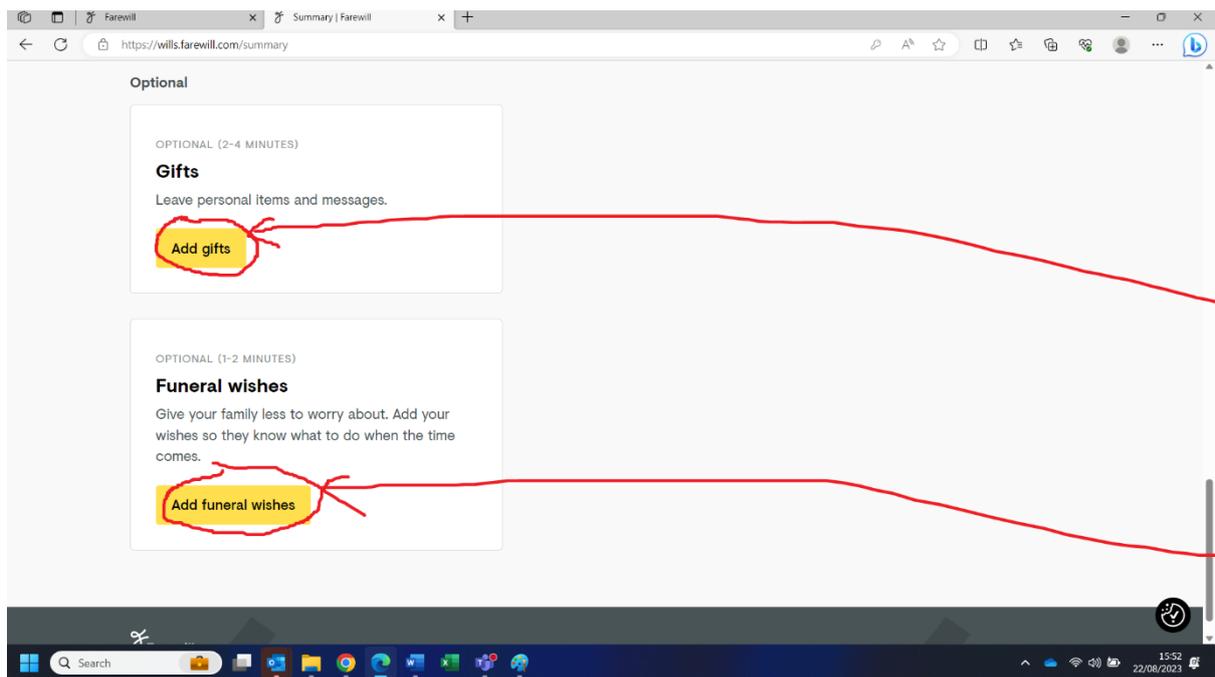
34) If you have opted to use Farewill Trustees as executors, you will be asked to confirm you have understood some terms and conditions.



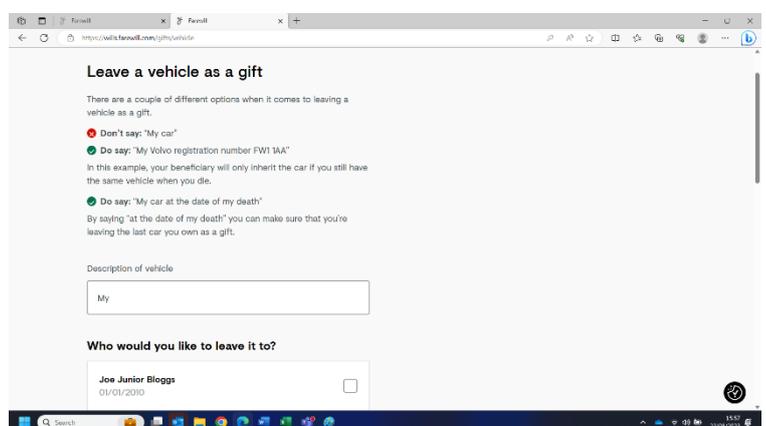
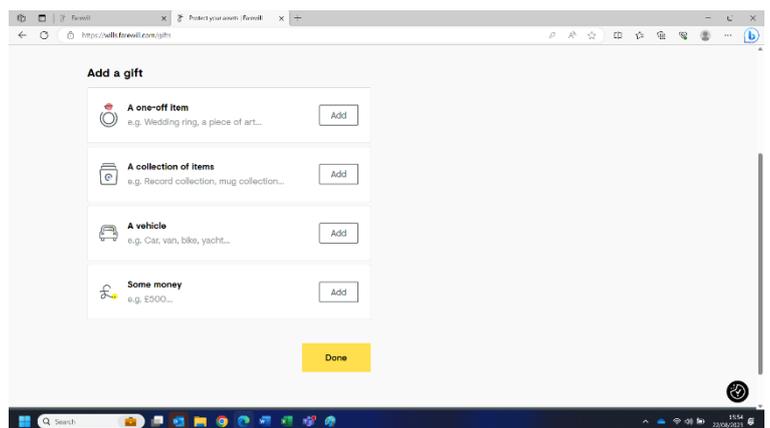
WELL DONE! You have completed your Will. You can either finish the process by clicking 'Purchase and send for checking' or you can choose to add in some optional extras.



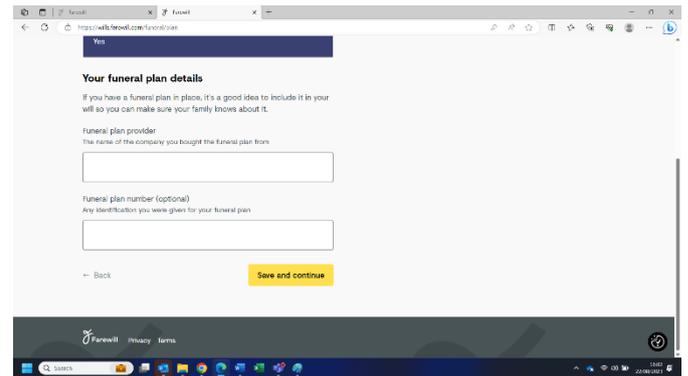
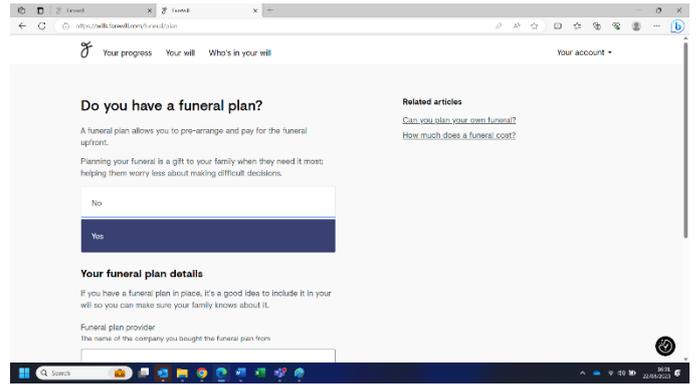
OR



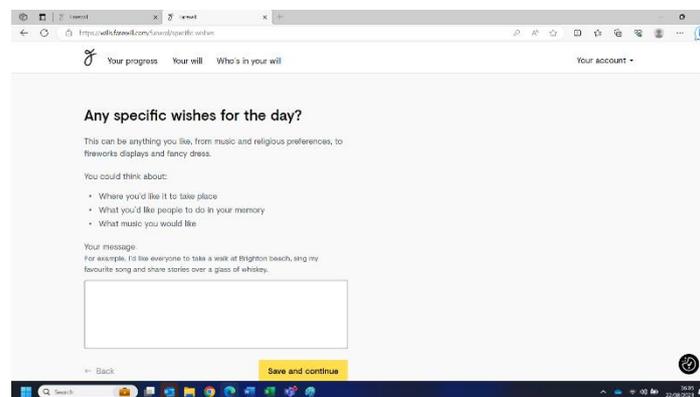
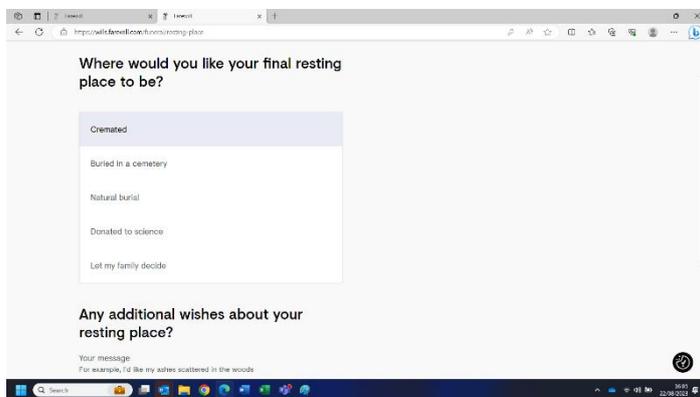
35) Leaving Gifts. You will be asked what type of gift you would like to leave, and to whom you would like to leave it. E.g. a one off item such as jewellery or a piece of art, a collection of items, a vehicle or a sum of money. You will have the opportunity to describe the item in as much detail as possible to avoid confusion and you can include a message to the beneficiary explaining why you are leaving them the gift. You will also have the option to add new people as beneficiaries at this point.



36) If you have a funeral plan, it is very helpful to include the details in your Will.



37) If you don't have a 'funeral plan' you still have the option to share details of your funeral wishes. This isn't legally binding but can help family with making difficult decisions.



WELL DONE on getting this far. You have now completed your Will. Please select the 'purchase and send for checking' button to complete your Will (you will not be charged).

https://wills.farewill.com/summary

Your progress: 100%

STEP 1 ✓

About you

Joe John Bloggs
01/01/1954
N10 5BR
Married to Johanna Betty Bloggs
The parent of Joe Junior Bloggs
The owner of Goldie

Edit

STEP 2 ✓

Guardians

Jeremy Brandan Bloggs and Jessica Brenda Bloggs will look after Joe.
You do not have guardians for all of your pets.

Edit

Your will is ready to be checked

Congratulations! Your will is ready to be checked by our specialists.

Purchase and send for checking

✓ We have invited johanna.bloggs@gmail.com
[Change Johanna Betty Bloggs's email](#)

16:07
22/08/2023