Farewill Step-by-Step Guide

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



2) Answer the step-by-step questions.

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

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Protect your partner Ensure they have everything they need if you pass away first.				l
Secure your children's future Appoint guardians if they're under 18 and make sure everyone gets a fair share.				l
 Share out your estate Divide your property and accounts between friends, family and charities. Continue online 				
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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.

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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.

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	Let's start with the basics		
	People in your situation usually finish their will in 12 minutes		
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	Already have a Farewill account? Log in		
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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.

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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.

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	Your partner's details	
	We'll invite your partner to create their own separate account	
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	Partner's email	
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8) Farewill will ask you how you heard about this service. You may wish to select 'through a charity'.

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	On a website or an app	
	Letter from Farewill	
	In a newspaper, magazine or delivery package	
	Through a charity	Ø .
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- 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.



 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.

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What's your full legal name?	
This is the name on your passport or driving licence.	
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What would you like us to call you?	
For example if we sent you an email or taked to you on the phone.	
Your preferred name (optional) For example, Lizzie	
Joe Bloggs	0
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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.

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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.



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	Joe Junior Bloggs	
Add all your biological and legally adopted want to leave things to them in your will.	Your child's date of birth	
Do not add any step children here. You can to leave them part of your estate.	Day Month Year	
Yes	01 01 2010	
No	If your child has a disability or will need a guardian after they turn 18, we recommend you seek specialist advice.	
	Save child	
+ Add child		
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Children you are expecting will need an update to the Will after they are born. You can do this by opting at the checkout 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.

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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.

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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.

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Who would you like Joe Junior Bloggs's guardian to be?	
Your children will be taken care of by your guardians if everyone with parental responsibility for them has died before they turn 18.	
This means that you should not choose your partner as a guardian if they already have parential responsibility of your children. Not sure? Learn more	
It's a good idea to choose either a couple or just one person as guardlen for your children.	
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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'.



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

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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).

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	This includes bank accounts, pensions, pro- policies, it helps your executors, the people estate after you die, know which providers	Address e.g. 27 Downham Road, London, NI SAA	ur will						
	We will not ask for specific details like accu	1 Normal Street, Normal Town N10 5BR							
		Does this property have a mortgage?							
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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'.

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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.

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Who would you like to inherit your estate? You can decide how much each person gets in the next step also be able to choose backups in case any of them die befo	ip. You'll fore you.												
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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 <u>How</u> 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.

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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.

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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%.

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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.

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If Penelope Pitstop dies before you, who should inherit their share of the estate instead? Writing a will is all about being prepared for the unexpected. This is why we also ask you to name back-ups in case your chosen beneficiary dies before you. These are known as secondary beneficiaries.	Inheriting your estate: A Penelope Pitstop 10% Backups: selecting now A Dick Dastardly 10% A Joe Junior Bloggs 74% + Holy Trinity (Kendal Parish Church) 3%
Their children	£ ORFUND 3%
Specific people, churches or charities	•
Split between remaining beneficiaries	
Selecting 'their children' includes all Penelope Pitstop's biological and legally adopted children but not step-children.	છ ્
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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.

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	Please give more details about your choice below									
	Include who you have not put into your will and why. This is important evidence to support your will if someone ever challenges it.									
	It can help to explain why you've chosen other people or charities instead of the person you've not put in the will.									
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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'.

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What is an executor? standard an ingradeable for starting out the dataset of your will after you do. This is known as "definitioning out out exist." This can how the other your hourses, waiting mane each or rease are paid, and ensuring what ensures is properly distributed according to your will, "As assess, may hourderake.	Questions? Coll ar un 1022 873 8738 et Enalue
Who do I choose to be my executor? You can choose professional executors, friends and family, or a	
combination of both. There's gaths at the important default that we need to go titldo. That's why these next fee pages might take a listle longer to get through.	

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.

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		Your will is ready to be checked
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	STEP 3	
	Sentander Bank account Legal and General Pension Vitality Life insurance	0

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.

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	V Your progress Your Will Who's in your Will	Your accou	ng •
	Do you have a funeral plan?	Related articles	
	A funeral plan allows you to pre-arrange and pay for the funeral	Can you plan your own funeral? How much does a funeral cost?	
	upfront.		
	Planning your funeral is a gift to your family when they need it most; helping them worry less about making difficult decisions.		
	No		
	Yes		
	Your funeral plan details		
	If you have a funeral plan in place, it's a good idea to include it in your		
	will so you can make sure your family knows about it.		
	Funeral plan provider The name of the company you bought the funeral plan from		
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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.

Where would you like your final recting	
place to be?	
place to be:	
Cremated	
Burled in a cemetery	
Natural burial	
Donated to science	
Let my family decide	
Any additional wishes about your	
resting place?	
Your message	
For example, rid like my ashes scattered in the woods	
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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).