



We would like to take the opportunity to introduce you to Dunn & Baker's Will drafting and tax planning service.

- Everyone should make a Will - It is particularly important if you own property. It is the only way to ensure your wishes are carried out and that your property reaches the people you wish to benefit. If you do not make a Will (known as an 'intestacy') then your property will be distributed under a complicated set of legal rules. Whilst these rules make limited provision for husbands and wives and those registered as civil partners, they may not adequately provide for them – for example your husband / wife could end up sharing your assets with your children.
- Create Trusts - This option can be appropriate for unmarried couples or people who have been previously married. It allows the surviving partner to continue to live in the property whilst still protecting the interests of other beneficiaries e.g. children from a previous marriage.
- Intestacy Rules - These do not make any provision for partners (except those registered as civil partners), remoter relatives, friends and charities all of whom you may wish to benefit.
- Property - Historically property has been a good investment. This means that even those who do not consider themselves to be wealthy can face an unexpected Inheritance Tax liability. We can explain the best options to suit your particular circumstances.
- If you already have a Will - Even if you have already made a Will we suggest that you should review it at least every 5 years or sooner if your personal circumstances change.
- Cost - We work on a fixed fee basis for the preparation of a Will which is discounted for couples. If your personal circumstances are complicated or you require Inheritance Tax advice then our charges are higher, but we will agree these with you before undertaking any work.

Please ask a member of our Wills Team for further information and a price guide on Exeter: 01392 285000 or Cullompton: 01884 33818.

*Dunn & Baker – Here to help you*

*Disclaimer: The material contained in this fact sheet is for general guidance only. It is specific to the law of England and Wales, and represents a brief outline of the law current as at the date of the fact sheet. It is not intended to constitute, or to be a substitute for, legal advice specific to your case. Dunn and Baker will be responsible only for advice specifically given to you.*