

**THE ERIC WHITEHEAD  
PARTNERSHIP**

**WILL ATTENDANCE NOTE**

<b>Date</b>	Attendance Note Dictated by fee earner - Attendance Note Typed-
<b>File Ref</b>	
<b>Client</b>	
<b>Matter</b>	Instruction for new Will.
<b>Attending Fee earner</b>	
<b>Person Attending</b>	
<b>Date of Attendance</b>	
<b>Time Spent</b>	

<b>Who was present before and during the meeting?</b>
<b>How is the client's health? <i>including eyesight</i></b>
<b>Domicile of the client and any spouse or civil partner</b>
<b>Details of assets (<i>including those passing outside of the will</i>)</b>

<b>Detail of liabilities (<i>including mortgages</i>)</b>			
<b>Names of family, dependants and anyone else who may inherit (<i>taking into account categories or potential claimant under the Inheritance (Provision for Family and Dependents) Act 1975</i>)</b>			
<b>Details of advice given, for example, in relation to the Inheritance Act 1975 and the clients response</b>			
<b>Details of how the client wished to dispose of their assets by will. <i>With a record of the open questions you asked to obtain the instructions.</i></b>			
<b>Client's reasons for making changes from any earlier will <i>and your exploration of those reasons.</i></b>			
<b>Your assessment of the client's testamentary capacity, <i>including the questions you asked to establish this and the client's answers</i></b>			
<b>Any signs of possible undue influence?</b>			
<b>Signed by the client</b>		<b>Date</b>	
<b>Signed by the client</b>		<b>Date</b>	