**Will Release Form – For completion by living Will makers**

Please complete this form and email it to [enquiries@clarkewillmott.com](mailto:enquiries@clarkewillmott.com) and attach copies of the evidence requested. If preferred, please post the completed form and evidence and authority to:

Private Capital Will Release Team (PC063)  
Clarke Willmott LLP  
Blackbrook Gate,

Blackbrook Park Avenue,

Taunton

TA1 2PG

We recommend that if sending the documents to us you use Royal Mail Special Delivery to avoid loss and delay.

If you have difficultly completing the form please call 0800 316 8890 and the team will help you. They will still need to receive the completed form and evidence from you and will not be able to complete it during the call.

If you are applying as a couple please complete and submit one form each (which can be sent together).

Please provide all the information requested in order to release original documents from our safe custody. If information is missing it may delay us in sending the Will.

We will acknowledge receipt of your request within 2 working days of receipt by email to the address stated in section 1.

We will aim to provide the Will within 7 to 10 working days but will call you if any further information or evidence is needed before your enquiry can be dealt with.

The original Will documents will be sent to the address stated by Royal Mail Special Delivery.

Please note that we will accept copy documents but we will carry out regular and random checks on them for authenticity.

All documents supplied to us will be scanned to our filing system as evidence of release and will then be shredded. The scanned copies will be stored in accordance with our standard data retention policy.

|  |  |
| --- | --- |
| 1. About you |  |
| * 1. Your full name including any middle names |  |
| * 1. Your full postal address (e will send the documents to this address unless you tell us otherwise) |  |
| * 1. Your date of birth |  |
| * 1. Your telephone number(s) |  |
| * 1. Your email address |  |
| * 1. Your National Insurance Number |  |
| * 1. Please confirm that you consent to our checking your identity electronically. This is in addition to the copy evidence required below. If you do not consent this may delay the release of the Will and necessitate our requesting further information from you |  |
| * 1. Please attach or enclose a copy of the following evidence:      1. A copy of the photo page of your passport clearly showing your signature; and      2. A copy of a utility bill or bank statement issued to you in the post in the last 2 months showing your name and home address OR      3. A copy of a DWP or HMRC letter sent to you in the last 12 months showing your name and home address |  |
| * 1. If your name and/or address was different when you made the will please confirm the details and provide a copy of any marriage certificate, decree absolute or deed poll to evidence a change of name |  |

|  |  |
| --- | --- |
| 1. About the Will | |
| Approximately when was the Will made? |  |
| Did Clarke Willmott act for you? If so, which office did you/the Will maker use |  |
| If the Will was made with another firm but you believe that we hold it, please provide details here |  |
| Do you think we should hold other documents for you or the Will maker and, if so, what are they and would you like us to send them to you?  (We may need further authority for joint documents, trusts and powers of attorney) |  |

|  |
| --- |
| 1. Further Information   Please use this space to provide us with any further information you wish to provide |

1. Authority for release of Will

|  |  |
| --- | --- |
| Name of Will maker |  |
| Address of Will maker |  |
| I consent to you carrying out an electronic identity check on me and authorise and instruct you to release my Will to the above address | |
| Signed |  |
| Dated |  |

|  |  |
| --- | --- |
| 1. Checklist | |
| * 1. Before you send us this form and the evidence and authorities please check that you are sending us everything we need | |
|  | Tick |
| This form fully completed |  |
| The evidence of identity, address and change of name |  |
| Signed authority |  |