

# Estate Planning INSTRUCTIONS

THIS FORM IS NOT REQUIRED UNTIL YOU AND YOUR CLIENT HAVE ACCEPTED THE SCOPE AND QUOTE PROVIDED BY THE LEGAL HUB.

I agree to the legal hub terms and conditions Yes No  
Would you like to use the legal concierge service? Yes No

## ADVISER DETAILS

Adviser name\* Practice name\*  
Adviser contact phone number\* Adviser email address\*

## CLIENT DETAILS

How many clients?\*

### CLIENT 1 (EG. HUSBAND)

Title\* Surname\* First name\* Middle names

### CLIENT 1: INITIAL EXECUTOR/TRUSTEE

Title\* Surname\* First name\* Middle names

Address\* Relationship to client 1

### CLIENT 1: 1ST SUBSTITUTE EXECUTOR/TRUSTEE

Title\* Surname\* First name\* Middle names

Address\* Relationship to client 1

### CLIENT 1: 2ND SUBSTITUTE EXECUTOR/TRUSTEE

Title\* Surname\* First name\* Middle names

Address\* Relationship to client 1



