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TALKING TO YOUR FAMILY ABOUT YOUR WILL - INFORMATION FOR CLIENTS

Walsh West Private Client Legal 2021

How do I talk to my family about my will?

Talking about your plans for what you leave in your will should mean fewer squabbles and less resentment – but how do you start that awkward conversation?

- Why it's good to talk
- Preparing for 'the talk'
- During the conversation
- Afterwards

Why it's good to talk

If you want to avoid family fights, both now and after you're gone, you should be considering having 'the talk' with them about your wishes.

It's your chance to explain what you're doing and help your family understand why you think it's the best course of action.

Nobody enjoys having to talk about death, but here's how to make the conversation as easy and conflict-free as possible.

Preparing for 'the talk'

1. Decide on your goals

Writing your will shouldn't be about who deserves what – it should be about what you want your money to achieve.

Start by writing a list of your key priorities.

Your priorities might be things like:

- ✓ Supporting a charity you care about
- ✓ Making sure that your spouse is provided for



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- ✓ Looking after a relative with an illness or disability
- ✓ Ensuring your grandchildren get the best education

Once you've decided what you want to achieve, it will be much easier to work out what to leave to whom.

It'll also help you explain your thinking to your family.

2. Write a rough draft of your will

The conversation will go much more smoothly if you have a basic draft of your will, or at least some notes.

That way you can talk about what you want, rather than have everyone else telling you what they want.

Nobody can tell you what to put in your will, in the end, it's your decision who should receive what.

3. Set a time to talk

- It can seem morbid arranging a special family meeting to talk about death.
- If you think it'll make people uncomfortable, don't do it.
- Instead, try setting aside a little time during a family event.
- Let your family know in advance that you'd like to talk about your will at that time – it makes it less of a mood killer and gives them a chance to think things over first.

During the conversation

1. Explain what you want to achieve

This is the time to set things off on the right foot.

Explain that there are reasons for the legacies you plan to leave – this helps your family to understand your point of view and gives people an idea of what to expect before you go into detail.

If you focus on what you want your will to achieve, rather than simply the pounds and pence, it can sidestep a lot of conflict.

2. Explain the details of your plan

Don't forget to link these details back to your goals.



Try phrases like: “We agree that John will need support in future, so I plan to leave him half my estate.”

3. Ask for suggestions and opinions

You might find that some of your family have specific expectations about your will – encourage them to be open about this so you can understand.

It’s your decision in the end, but others might have some good ideas about how to look after family and friends that you haven’t thought of.

They might also care a lot about a particular sentimental object.

4. Stress that it’s ‘for now’

- Many things might happen between your conversation and the end of your life.
- New babies might arrive or you might lose someone in your family.
- You can (and should) change your will when these things happen. Reassure your family that you’re prepared to review and reassess as things change.

5. Remember to be as tactful as you can

Many family relationships can be a bit rocky, and discussing wills and inheritances can bring this out into the open.

Make it clear that this isn’t about criticising people – it’s about what you want to happen to your assets when you’re gone, and you want to be constructive about that.

Of course, some of your decisions might be based on who you like and don’t like – but saying so won’t do you any favours.

Instead, try explaining that the money would do more good elsewhere.

Again, this will be much easier if you are clear on your goals.

Afterwards

1. Review your plan

You can review your plan after you’ve had the conversation – it might have just reinforced what you want to do or it might have given you some good ideas about changes you want to make.

2. Write or update your will



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After talking things through and taking your family's ideas on board, you're ready to go to the next stage – writing your will for the first time or updating an existing will.

- ✓ Writing a will – your options
- ✓ Changing your will

For initial advice about Estate Planning including Lasting Powers of Attorney, Wills, Trusts and Probate; call our team on 0203 488 7503, 01992 236 110 or contact us by email at welcome@walshwestcca.com or via our website www.walshwestcca.com and we will help you.