

# LETTER OF WISHES EXCLUSION

Testator: \_\_\_\_\_

Address: \_\_\_\_\_

This Letter of Wishes is intended to provide guidance and clarification to the Executors and Trustees of my Last Will and Testament (Will). It is not legally binding but is intended to be taken into consideration in the administration of my estate in accordance with UK law.

## 1. Purpose of this Letter of Wishes

This Letter of Wishes is to express my preferences regarding the distribution of certain assets and to provide any additional instructions which I consider important for the proper administration of my estate. This document is supplementary to my Will and does not replace or alter its terms.

## 2. Exclusions from the Will

I specifically direct that the following assets, property, or interests shall be excluded from the distribution provisions of my Will and shall be treated in accordance with the instructions set out herein:

### 2.1 Excluded Assets

(a) Personal belongings and keepsakes as detailed in the attached Schedule A. (b) Trust funds established prior to the date of this Letter of Wishes. (c) Any assets or property subject to third party agreements or restrictions.

## 3. Instructions Regarding Excluded Assets

The Executors and Trustees shall ensure that excluded assets are managed, held, or distributed as follows: (a) Personal belongings and keepsakes shall be distributed to the individuals named in Schedule A. (b) Trust funds shall continue to be administered by the appointed Trustees in accordance with the trust deeds. (c) Assets subject to third party agreements shall be handled in compliance with such agreements and relevant laws.

## 4. Confidentiality

I request that this Letter of Wishes and the details contained herein be treated as confidential and only disclosed to my Executors, Trustees, legal advisors, and beneficiaries as necessary.

## 5. Amendments and Revocation

I reserve the right to amend or revoke this Letter of Wishes at any time prior to my death. Any such amendments or revocations shall be made in writing and communicated to my Executors.

## 6. Governing Law and Jurisdiction

This Letter of Wishes shall be governed by and construed in accordance with the laws of England and Wales. The courts of England and Wales shall have exclusive jurisdiction to settle any dispute arising out of or in connection with this Letter of Wishes.

## 7. Non-Binding Nature

I acknowledge that this Letter of Wishes is not legally binding on my Executors or Trustees. However, it is my sincere wish that the instructions and preferences expressed herein be given due regard and effect wherever possible.

## 8. Signatures

Signed by the Testator as a Letter of Wishes, intended to be read in conjunction with the Last Will and Testament.

**Schedule A – Personal Belongings and Keepsakes Distribution**

1. Family Heirlooms - To be distributed among my children equally.
2. Jewelry and Watches - To be given to my spouse.
3. Artwork Collection - To be held in trust for future generations.
4. Personal Letters and Diaries - To be retained by my Executors.
5. Other Personal Items - As per my detailed list held privately.

**TESTATOR'S SIGNATURE**

**WITNESS'S SIGNATURE**

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

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