

PREPARING YOUR WILL QUESTIONNAIRE

This questionnaire raises questions relating to your personal and financial affairs which need to be considered when preparing your Will. You may not be able to answer all the questions and we do not expect you to do so. It would be helpful if you could complete the first part of the questionnaire, providing us with information about you and your family. You need not complete the latter parts of the questionnaire if you do not wish to do so but you may find it helpful to read it through as these questions are ones that you should be thinking about when you prepare your Will. If you can provide an estimate of the assets in your estate this would be very helpful and would provide a useful summary for the future.

PART I — YOUR DETAILS

1. Name

Forenames

Surname

Have you been known by any other name and do you own assets in another name? If so, please provide details.

2. Address

Address

Telephone number (work) (home)

Fax number (work) (home)

E-mail

3. Other details

Date of birth

Nationality

Domicile

Country of residence for tax purposes

Occupation

PART 2 — YOUR SPOUSE, CIVIL PARTNER OR PARTNER

1. Name

Forenames

Surname

Has your spouse/civil partner/partner been known by any other name? If so, please provide details

2. Other details

Date of birth

Nationality

Domicile

Country of residence for tax purposes

Occupation

3. Marriage/civil partnership/partnership details

If you are married —

Date of marriage

If you have entered into a civil partnership

Date civil partnership registered

Did you sign a pre-nuptial contract or other similar agreement?

Yes No

If you are not married or in a civil partnership—

Do you intend to get married/enter into a civil partnership in the near future?

Yes No

Did you sign a cohabitation or other similar agreement?

Yes No

Previous marriages/civil partnerships—

Have you been married or in a civil partnership before?

Yes No

PART 3 — CHILDREN

1. Your children

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	

2. Grandchildren

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	

3. Your spouse's/civil partner's/partner's children

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	

PART 4 — PROPERTY

1. House occupied as your main home

Address

(1) Is the property owned in your sole name or jointly?

sole name joint names

Name of joint owner

Joint tenants Tenants in common

In what shares is the property held?

Freehold Leasehold

Value

Details of mortgage

(2) Is the property rented?

Yes No

(3) If neither of the above, who owns the property?

(4) Where are the deeds to the property located?

2. Other houses

Address

Is the property owned in your sole name or jointly?

sole name joint names

Name of joint owner

Joint tenants Tenants in common

In what shares is the property held? Is the property:-

Freehold Leasehold

Value

Details of mortgage

3. Business

Name of business
Address
Nature of business
<input type="checkbox"/> Company Number of shares % of shares
<input type="checkbox"/> Partnership Partnership share
<input type="checkbox"/> In sole control

4. Bank, Building Society etc accounts

Name of Bank/Building Society		
Branch		
Account number		
Estimated value		
Is the account held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If the account is held jointly—</i>		
Who provided the funds, and in what shares?		

5. Personal Effects of significant value

Description	
Value	
Are the personal effects held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Heritage exemption?	<input type="checkbox"/> Yes (CTO reference)) <input type="checkbox"/> No

6. Life assurance and pension policies

	Life assurance policies	Pension policies
Details of policy		
Life assured		
Value		
Written in trust	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

7. Stocks and shares

In sole name

In joint names

Value of investment portfolio

Investment manager

If the fund is held jointly is it held as joint tenants or tenants in common

	<input type="checkbox"/> Joint tenants <input type="checkbox"/> Tenants in common <input type="checkbox"/> Not known
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8. Property situated outside the UK

Type of property	Situs	Value
Type of property	Situs	Value

9. Settlement interests

Do you have any interest under a settlement created by you or any other person ?

If so, please provide details:

Type of settlement:

Discretionary Trust

Pre-March 22, 2006 trust: Life interest trust Accumulation and maintenance trust

Post-March 22, 2006 trust: Life interest trust

Will trust: Immediate post-death interest 18-to-25 trust

Your interest:

Pre-March 22, 2006 life interest Post-March 22, 2006 life interest

Transitional serial interest Immediate post-death interest Discretionary beneficiary

Default beneficiary

Do you have a power of appointment or power of revocation over the Trust Fund? Yes No

Is it subject to consent? Yes No If yes, by whom? Are the trustees resident in the UK? Yes No

Have they ever been resident outside the UK? Yes No

What is the value of the trust assets?

10. Other assets

Please provide details

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Have you made any gifts within the last seven years? If so, please provide details.

<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>

Do you expect to receive any property of substantial value in the near future, for example as an inheritance? If so, please provide details

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Summary of property	Value of property
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	In sole name	In joint names
House (occupied as main home)		
Business		
Bank accounts and/or Building Society accounts		
Significant personal effects		
Insurance policies		
Pension policies		
Stocks and shares		

Property situated outside UK		
Other assets		
Total		

PART 5 — OTHER WILLS

Please provide details of any existing Wills (and a copy)

Where is the original located?

PART 6 — FUNERAL WISHES AND APPOINTMENT OF EXECUTORS AND GUARDIANS

A testator may include funeral directions in his Will but **these will not be legally binding on the executors**

buried cremated no preference body used for medical research

Executors

A person making a will should choose who should be his executors and appoint them in his Will. The duties of the executors are to collect in the estate of the deceased, to pay the debts and to distribute to the persons properly entitled in the Will. You should appoint at least two executors to guard against an executor's prior decease. You can appoint substitute executors who will act if, for any reason, an executor is unable or unwilling to act. You may appoint your spouse or partner as executor.

Executors	(1) Name
	Address
	(2) Name
	Address

Substitute executors	(1) Name
	Address
	(2) Name
	Address

Guardians

You may appoint guardians of your children under the age of 18. Generally speaking the appointment of the guardian will only take effect when both you and the child's other parent have died. If you are a single parent or if you are divorced from the other parent of your child or you are in a civil partnership, special rules will apply. It is preferable for discussions to take place with the proposed guardian before making the Will to ensure that he appreciates and accepts his responsibilities. In view of the potential disruption to the guardian's own family and the costs of caring for an additional child you may wish to consider leaving the guardian a legacy

Guardians to be appointed on the death of the survivor of you and the child's other parent	(1) Name
	Address
	(2) Name
	Address

PART 7 — BENEFICIARIES

You may wish to include specific gifts of personal belongings, other property or cash gifts in your Will

Gifts of personal items	You may include specific gifts in the Will or a generic gift to your executors or to a beneficiary with the request that they will dispose of particular items in accordance with a memorandum or letter of wishes. Anything detailed in a letter of wishes will not legally binding on your Executors. If you do not own the specific item identified in the gift at the date of your death the gift will fail and the beneficiary will get nothing.	
	<input type="checkbox"/> specific gift(s) <input type="checkbox"/> generic gift (with letter of wishes)	
Details of gifts	Name	Item
	Address	
	Name	Item
	Address	
	Address	

Specific gifts of interest in a house or flat	Name
	Address
	Property
	Name
	Address
	Property

Cash gifts	Name	£
	Address	
	Name	£
	Address	

Residue

Your residuary estate is what is left after your executors have paid all debts, expenses, administration costs and legacies. You may consider the following:

- (1) Gifts to spouse/civil partner/partner may be made outright or on continuing trusts. There may be advantages in using a continuing trust.
- (2) Gifts to children or grandchildren. These can be made outright or on continuing trusts. If the children or grandchildren are young, you may wish to delay distribution of capital until they are older.
- (3) Default gifts. You should decide who you would wish to benefit if your spouse/civil partner/partner and children die without issue. You may wish to benefit charities.

(1) Name Share of residue

Address

(2) Name Share of residue

Address

PART 8 — LASTING/ENDURING POWERS OF ATTORNEY AND LIVING WILLS

Lasting/Enduring power of Attorney

Have you appointed someone to act as your attorney? If so, please provide details (and a copy) of the document.

Name and address of attorney(s) and his (their) relationship to you

Where is the original document located?

Where two or more attorneys are appointed do they act Jointly and severally Jointly

Has the document been registered with the Court of Protection?

Yes No

If you do not have an existing Power of Attorney, would you like advice on drafting a Lasting Power of Attorney?

Yes No

If you have any further questions, please call or email:

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Will Questionnaire

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