

# WILL QUESTIONNAIRE

In order that we may prepare your Will and discuss with you any matters that may be relevant, please complete this Questionnaire as far as possible and return it to us.

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(Ref: **Miss Heather Wheatley**)

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A separate Questionnaire should be completed by each person wishing us to prepare a Will for them.

Please note that there is a separate continuation sheet attached if you do require extra space for any answers or queries.

**SECTION A : PERSONAL DETAILS**

**Your FULL Name and Address**

Mr / Mrs / Ms / Miss

**Date of Birth:**

**National Insurance No** (for identification purposes):

**Daytime Tel:**

**Mobile:**

1. Have you made a Will before ? YES / NO  
If so, do we hold your original Will ? YES / NO  
If we do not hold your original Will then please provide us with a copy.
2. Are you single / married / divorced / separated / widowed ?
3. Have you been married before ? YES / NO

**Your Partner's Full Name, Address and Date of Birth**

Mr / Mrs / Ms / Miss

1. Are you and your above named partner married to each other ? YES / NO  
If not:  
(a) is your partner single / married / divorced / separated / widowed ?  
(b) are you and your partner intending to marry in the near future? YES / NO
2. Has your partner been married before ? YES / NO

**Are you or your partner known by any other names** and do you own any assets in these names? If so, please give full details below:

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**SECTION B : YOUR FAMILY**

**Your Childrens' Full Names, Dates of Birth and Addresses (if different to yours)**

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If your partner has children from a previous relationship then please give details below.

**Your Partner's Childrens' Full Names, Dates of Birth and Addresses (if different to yours)**

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If any of your children are under 18 at the moment then you should consider appointing Guardians in the event of the death of both parents. Guardians are in effect responsible for bringing up the children and you should obviously ask the people who you wish to appoint to ensure that they are willing to act. Please give details of any Guardians who you wish to appoint under your Will.

**Guardians Full Names and Address**

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Please give details of any other dependants you may have, ie. people who you are supporting financially:

**Full Names, Dates of Birth and Addresses (if different to yours) – Please also give details of how they are dependent on you**

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Please give details of any grandchildren that you have:

Full Names, Dates of Birth and Addresses

**SECTION C : BURIAL WISHES** (Please note that these do not have to be included in your Will but can be put in if you wish)

**Can you please specify whether you wish to be buried or cremated.** If you have a burial plot reserved then please provide details. If you wish to be cremated then please state any preferences for the disposal of your ashes. **YOU SHOULD MAKE SURE THAT YOUR EXECUTORS KNOW YOUR WISHES NOW IN CASE THEY DO NOT LOOK AT YOUR WILL BEFORE MAKING THE FUNERAL ARRANGEMENTS.**

Burial Wishes

**SECTION D : EXECUTORS**

Executors are appointed to carry out the instructions in your Will. You could appoint your partner as sole Executor if they survive you and then include an alternative appointment to take effect if they die before you. Otherwise you may appoint up to four Executors and it is generally wise to have at least two. You should check with the people you wish to appoint to ensure that they are willing to act as your Executors. If continuing trusts arise under your Will (perhaps because a beneficiary is a minor) then the Executors will usually act as Trustees too. Your Executors must be over 18.

**If your partner (named in Section A) survives you then would you like her / him to act as your Executor:**

YES / NO

**If no, or if your partner predeceases you then who would you like to appoint as your Executors:**

Full Names and Addresses
(1)          
(2)          

**SECTION E : BENEFICIARIES**

These are the people who will benefit under your Will.

**1. SPECIFIC CASH GIFTS**

Please give the name and address of the beneficiary and the amount to be given, together with the age of anyone who is under 18. If any of the beneficiaries are under 18 then at what age would you like them to inherit. (The age they inherit can be set lower to, say, 16 or higher to perhaps 21 or 25 as you wish.)

**Full Names, Addresses, Amounts to be given, Age now and Age at which they should Inherit (if currently under 18):**

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**2. SPECIFIC GIFTS OF ITEMS**

(a) Please give the names and addresses of anyone to whom you wish to leave specific articles and a full description of the item to enable it to be identified.

**Full Names, Addresses and Items to be given**

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(b) If you wish to make a large number of specific gifts of items then it might be easier to do this by way of a separate memorandum to be placed with your Will.

Please tick the following box if you feel this would be more appropriate

### 3. YOUR RESIDUARY ESTATE

This is everything that remains in your estate after the payment of any cash gifts and the gifts of any items have been made and also after your funeral expenses and debts have been settled. You should note that if you or your partner own property jointly, this property will generally pass to the survivor of you automatically rather than under your Wills. The exception to this rule is where you and your partner own property as tenants in common.

**In the first instance, do you wish your partner (named in Section A) to inherit your entire estate ?**

YES / NO

If not, or if your partner predeceases you then please set out below the people who you would wish to benefit from your estate. If you do not wish your estate to be divided equally between these beneficiaries, then please indicate the percentage share in the estate which each beneficiary is to receive. Please note that beneficiaries will receive their interest in the estate at 18 but you can specify a later age if you wish. If any beneficiaries are under 18 then please give their dates of birth and the age at which you would like them to inherit.

<b>Full Names, Addresses and Share of the Residue (if not to be equally)</b>	<b>Date of Birth and Age at which they should Inherit (if currently under 18)</b>

**In the event of any of these beneficiaries predeceasing you, or not reaching the age of inheritance, what would you want to happen to their share of your estate?** For example, it could pass to their children or spouse or be divided equally among the other surviving beneficiaries.

**ARE THERE ANY SPECIAL POINTS YOU THINK WE SHOULD BE MADE AWARE OF ?** (eg. Do you receive any benefit under a Trust? Is there any Court Order / Agreement in place relating to a Matrimonial Settlement?)

**For our marketing purposes, would you please let us know where you heard about our Firm:**

Are you an existing client ?

Did you hear about us from a relative or friend who is a client ?

Did you find us in Yellow Pages / Dentons / the Telephone Book ? (please state which)

Other (please state)

**CONTINUATION SHEET**

(Please use this sheet if you need more space for your answers or if you have any queries you would like to raise)



## VALUING YOUR ESTATE

Please complete the following sections in order to give us a full picture of your situation and enable us to raise any relevant matters about pre-death estate planning and the drafting of your Will. **All information given is of course treated in the strictest confidence.**

Please provide details of any assets which are owned solely by you or by your partner in the appropriate sections below. If you or your partner have any liabilities (for example, mortgages or personal loans) in your sole names then please give approximate values. Don't forget to mention any insurance policies or pension schemes and please advise us if these are already subject to trusts governing their destination on your death. Please also indicate if any assets on your list are used for business or agricultural purposes as this may be important for tax reasons.

### INHERITANCE TAX

If your estate exceeds £300,000 for single people and up to £600,000 for married couples under certain circumstances, then some Inheritance Tax may be payable on your death. Please tick the following box if you would like to explore the possibility of re-arranging your affairs so that the amount of Inheritance Tax payable on your death is either reduced or eliminated

### SPECIAL CIRCUMSTANCES

It is important that we know of any special circumstances that might be relevant to your Will. Some examples are given below, but please mention anything which you think might be relevant.

Please tell us if:

- You own any foreign property (especially land)
- You have a foreign domicile
- You have made a foreign Will
- You or other members of your family have an interest under an existing Trust created by a Will or Settlement
- Any member of your family is handicapped, financially vulnerable or has any special needs or problems
- Any claim against your estate might be made under the Family Provision legislation (which allows claims by a spouse, former spouse, partner, children, children of the family or anyone who you are maintaining).

**ASSETS (APPROXIMATE)**

	<u>In your Sole name</u>	<u>In your Partner's Sole name</u> (if known)	<u>In your Joint names</u>
HOUSE	£.....	£.....	£.....
CONTENTS/ BELONGINGS	£.....	£.....	£.....
BANK/ BUILDING SOCIETY ACCOUNTS	£.....	£.....	£.....
INVESTMENTS/ SHARES	£.....	£.....	£.....
LIFE POLICIES	£.....	£.....	£.....
LOANS DUE TO YOU	£.....	£.....	£.....
TRUST INTERESTS	£.....	£.....	£.....
GIFTS OF OVER £250 MADE IN THE PREVIOUS 7 YEARS (including Charity donations)	£.....	£.....	£.....
MISCELLANEOUS	£.....	£.....	£.....
PENSION POSITION	£.....	£.....	£.....

**If you own any agricultural property or have any interest in a business then please set out brief details below:**

**LIABILITIES (APPROXIMATE)**

	<u>In your Sole name</u>	<u>In your Partner's Sole name (if known)</u>	<u>In your Joint names</u>
MORTGAGE	£.....	£.....	£.....
LOANS	£.....	£.....	£.....
CREDIT CARD LIABILITIES	£.....	£.....	£.....
MISCELLANEOUS	£.....	£.....	£.....

**ASSETS OUTSIDE YOUR ESTATE (APPROXIMATE)**

LUMP SUM PENSION BENEFITS	£.....	£.....	£.....
POLICIES IN TRUST FOR SOMEONE ELSE	£.....	£.....	£.....
EXPECTANCIES UNDER WILLS AND TRUSTS	£.....	£.....	£.....

**Thank you for taking the time to complete this Questionnaire.**