



Will questionnaire

Before we meet to discuss your will, you may wish to complete this form and bring it with you. It is not essential, but many people find it a useful way of gathering all the relevant information.

If you need assistance or have any questions, please get in touch - contact details are shown at the end of the questionnaire. If you need more space to provide fuller information, please continue on a blank sheet.

Part A - you and your family

1. Your details

Forenames _____

Surname _____

Date of birth _____

NI number _____

Occupation _____

Address _____

Work No. _____ Home No. _____

Mobile No. _____

E-mail address _____

If you (or any member of your family) is known by any other name and/or own any assets in a different name, please give full details.

2. Your husband/wife/civil partner/partner

Forenames _____

Surname _____

Date of birth _____

Occupation _____

3. Marriage/partnership details

a) Year of marriage/civil partnership _____

b) If you are not married to, or in a civil partnership with, your partner please tick box

c) If you intend to marry/re-marry/enter into a civil partnership in the near future please tick box

d) Has either of you been married/in a civil partnership before
 YES NO

4. Your children (including any from a previous marriage/relationship).

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

continued overleaf



5. Children of your husband's/wife's/partner's previous marriage/relationships

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

Full name _____

Date of birth _____

Address (if different from yours) _____

Note

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- Children excluded from benefit under your will may have a right to claim a share of your property in certain circumstances. Please ask for advice if this may be relevant.

6. Family connections

a) Do you or your family have connections with the USA?

YES NO

b) If yes, please give details _____

Part B – your home and other assets

7. Your home (please tick appropriate box)

Is your home:

- a) Owned:
- i) in your name alone? YES
 - ii) in joint names with your husband/wife/partner? YES
 - iii) in the name of your husband/wife/partner alone? YES
- b) Rented? YES
- c) Other (eg provided by a relative)? YES
- d) Approximate value _____

8. Other

If you answered YES to (c) above, please give more details

9. Your business

Do you have your own business? YES NO

If yes, state type of business:
 company partnership/LLP In your sole name

Please state the name of the business and approximate value

10. Your main assets

Please list your other main assets below, along with approximate values.

11. Joint assets

Do you have any jointly-owned assets? If yes, please give a general description, approximate values and name(s) of the other owner(s).

Note: Jointly-owned assets generally pass to the joint owner automatically and cannot be given away by will.



12. Do you own any assets abroad?

If yes, please give details

Part C – funeral, executors, guardians

13. Funeral

You may specify in your will if you wish to be:

Buried Cremated No preference

Do you have any other wishes or preferences regarding your funeral arrangements?

14. Executors

You must appoint executors to carry out the instructions in your will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend. Executorship involves responsibility and you should ask the people you would like to act before naming them in your will.

Please list at least two and no more than four chosen executors:

Name _____

Address _____

Name _____

Address _____

Name _____

Address _____

Name _____

Address _____

Would you like partners from our firm to act as your executor(s)?

YES NO

If you answered yes, we will explain our role (and costs) in detail when we meet.

15. Guardians

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

Please list chosen guardians:

Name _____

Address _____

Name _____

Address _____

Part D – beneficiaries

The main part of your estate is called ‘the residue’. (This is dealt with at question 18.) Before giving away the residue, you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or charities. These will be known as ‘beneficiaries’.

You may also wish to consider a gift or trust as a tax-planning measure. We will discuss this with you when we meet.

16. Cash gifts

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

Name _____

Address _____

Amount _____

Name _____

Address _____

Amount _____

Name _____

Address _____

Amount _____



16. Cash gifts continued

Name _____

Address _____

Amount _____

Name _____

Address _____

Amount _____

17. Gifts of articles

Please give the names and address of people to whom you wish to leave specific items, and a full description of the article to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he/she will be not given a substituted item or the cash equivalent.

Name _____

Address _____

Article _____

Name _____

Address _____

Article _____

Name _____

Address _____

Article _____

Name _____

Address _____

Article _____

Name _____

Address _____

Article _____

18. The residue

This is all that you own with the exception of jointly-owned property and gifts made in questions 16 and 17.

Please state who is to receive the residue on your death and who is to receive it should that person die before you.

If there are gifts to children, we may suggest that if any of them should die before you leaving children of their own, those children (your grandchildren) will inherit their parent’s share. You may also wish to consider using trusts for tax planning purposes – we will discuss this with you when we meet.

The following are the more common provisions. If you wish to use one of these, please tick the relevant box. If not, please go to question 19.

- a) Everything to my husband/wife/partner (named at question 2) outright, but if he/she has died, then to my children (named at question 4), equally.
- b) Everything equally to my existing children (named at question 4) and to any other children I might have.
- c) To my husband/wife/partner (named at question 2), but if he/she has died before me, to the person(s)/organisation(s) named below. If not in equal shares, then show the share each is to take.

Person(s)/organisation(s):

Who is to benefit if the recipient dies before you?

Name _____

Address _____

Share _____

Name _____

Address _____

Share _____

Name _____

Address _____

Share _____

19. If none of the above choices is appropriate

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

Name _____

Address _____

Share _____

Name _____

Address _____

Share _____

Name _____

Address _____

Share _____

NOTES AND GENERAL INFORMATION

- A will is usually completely cancelled if you marry or enter into a civil partnership after making it. You will need to make another will immediately, or one that takes a forthcoming marriage or civil partnership into account.
- On divorce or dissolution of a civil partnership, gifts to your husband/wife/civil partner are cancelled, as is his/her appointment as executor, but the rest of the will stands. This can create problems and it is better to make a new will.
- If you are not making any provision for a husband/wife/partner or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this situation may apply, please ask us for further advice.
- Please ask for help or more information on any topic related to your will during your appointment.

Contact

Please contact either partner in our wills, probate & trusts team:

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