



WILL QUESTIONNAIRE

Please complete this questionnaire as fully as possible. We will then go through it with you, discuss your wishes and then prepare the Will ready for you to sign.

If completing by hand please use BLOCK CAPITALS. Please use full names as shown on passport.

Do you have an existing will? Yes No

If yes where is it held?

Part A – You and Your Family

1. Your details

Forenames

Telephone Number

Surname

Mobile Number

Address

Email

Date of Birth

Occupation

Postcode

Place of Birth

Are you/have you ever been known by any other name, including maiden name/previous married name? Do you own any assets in a different name? If so, please give full details below:-.

2. Your Husband/Wife/Civil Partner ('Partner')

Forenames

Occupation

Surname

Address (if not same as above)

Date of Birth

Place of Birth

3. Marriage/Partnership Details

(a) I am **not** married/in a civil partnership

(d) If you are married, have you or your spouse/civil partner been widowed/divorced.

(b) I intend to marry/enter into a civil partnership in the near future

(c) I am married

The Date of Marriage/Civil Partnership was

	Me	Spouse/Partner
Divorced	<input type="checkbox"/>	<input type="checkbox"/>
widowed	<input type="checkbox"/>	<input type="checkbox"/>

Please list all deaths/divorces and give date of death/ date of decree absolute

4. Your Children (including children from a previous relationship) - full names, dates of birth, and address if different from yours. Please go on to separate page if necessary.

(a)	Name Address	Date of birth
(b)	Name Address	Date of birth
(c)	Name Address	Date of birth

5. Your Husband/Wife/Partner’s children from previous relationships - full names, date of birth, and address if different from yours

(a)	Name Address	Date of birth
(b)	Name Address	Date of birth
(c)	Name Address	Date of birth

Please 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 appropriate.

6. Other Dependants

Do you support anyone financially other than those mentioned in 2 and 4 above. This includes providing money or accommodation to someone e.g. a former spouse. If yes, please provide more details. If necessary please draw a family tree on a separate sheet. Yes No

Part B – Funeral, Executors, Guardians

7. Funeral

You may specify your funeral wishes in your Will. Please note your executors do not have to follow your request. You do not need to complete this section if you do not wish to.

I wish to be Buried Cremated No preference

in accordance with the rites of _____faith / with no service / other _____

8. Executors

Executors are responsible for carrying out the instructions in your Will. It is wise to have at least two executors. If your estate is simple you may wish to appoint your spouse as your executor with your children as replacement executors. You should name other executors to act if your chosen executors are unable to. The partners of our firm are happy to act as executors, either alone or with a member of your family or friend or as replacement executors.

List below up to four chosen executors:

(a)	Name
	Address
(b)	Name
	Address
(c)	Name
	Address
(d)	Name
	Address

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

Yes No

9. Guardians

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

(a)	Name Address	Relationship to you
(b)	Name Address	Relationship to you

Part C – Your Home and Other Assets

10. Is your home:

(a) Owned:

- (i) in your name alone? Yes No (b) **Rented?** Yes No
- (ii) in joint names with your spouse/partner? Yes No (c) **Other** e.g. living with family Yes No
if (c) please provide more details _____
- (iii) by your spouse / partner alone? Yes No _____

11. If you own your own home, please give an approximate value of the property and the amount of any mortgage or charge outstanding on it. If owned jointly what share do you own?

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Please note: If we acted in the connection with the purchase of your property we may already have this information

12. Do you have a Business? If yes, state type of business

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Is it: Company Partnership Sole Trader

Your main assets owned by you alone

Please list your main assets and give approximate values e.g. investments, property, artwork etc.

13. Joint assets

Do you own assets with someone else? E.g. a bank account or some land. If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

14. Do you own any assets abroad? eg a holiday home or timeshare, bank account.

If yes, please give details:-

15. Do you have any life policies or death in service benefits? If yes, please give details:-

Part D - Beneficiaries

The main part of your estate is called "the residue". (This is dealt with at question 18 and 19). Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, friends or charities etc. Many of our clients have a cause they are passionate about and wish to remember a charity in their will.

PLEASE INFORM US IF ANY BENEFICIARY IS UNDER 18, ON MEANS TESTED BENEFIT OR DISABLED.

16. Gifts of specific items

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. If articles are very similar you may wish to put a photo of each item with your Will. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will not be given the substituted item or cash equivalent.

Please go onto a separate sheet if necessary.

(a)	Full Name Address Article
(b)	Full Name Address Article
(c)	Full Name Address Article

If you prefer, you can include a clause in the will by which you leave your personal possessions to your executors to distribute in accordance with any letter(s) they find after your death, with anything unaccounted for going to your residuary beneficiaries. This allows you to change your mind over time without needing to rewrite your will

17. 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. Please go onto a separate sheet if necessary.

(a)	Full Name	Date of birth	Amount: £
	Address		
(b)	Full Name	Date of birth	Amount: £
	Address		
(c)	Full Name	Date of birth	Amount: £
	Address		

18. The Residue

Residue is made up of your remaining assets (except for jointly owned property and gifts made in questions 16 and 17) after liabilities and expenses are paid. The questions below ask who you would like to leave your residue to and in what shares and, if they die before you, who you would want his or her share to go to. If you are leaving a share to your own children and one of your children dies before you, you may wish his or her children to inherit his or her share equally.

The following are the more common ways to leave your residue. *Please tick the appropriate box and if none of them are appropriate please go to question 19.*

(a) Everything to my **spouse/partner** outright, but if he/she has died to my **children** equally

When do you want your children to receive control of the capital e.g. at age 18, 25 _____

(b) Everything to my **children** equally

When do you want your children to receive control of the capital e.g. at age 18, 25 _____

(c) To my **spouse/partner**, but if he/she dies before me to the following **person(s)/organisation(s) named** below. If not in equal shares, then show the share each is to take.

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19. If none of the above choices are appropriate

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares? E.g. 1/16th, 20%. Please go on to a separate sheet if necessary.

(a)	Full Name	share
	Address	
(b)	Full Name	share
	Address	
(c)	Full Name	share
	Address	

- 20.** Who is to benefit if the recipient dies before you? A share can be divided between more than one person, or it can go to the beneficiaries children/grandchildren e.g. to my cousin Bob and if he dies before me his issue.

If (a) dies before you	Full Name	share
	Address	
If (b) dies before you	Full Name	share
	Address	
If (c) dies before you	Full Name	share
	Address	

General Notes

- 1. A will is usually completely revoked (cancelled) if you marry/enter into a civil partnership after making it. You will need to make another Will immediately, or make one which takes your forthcoming marriage/civil partnership into account.**
- 2. On divorce/dissolution of a civil partnership, gifts to your spouse/partner are normally cancelled as is his/her appointment as executor but the rest of the Will is valid. This can create problems and it is better to make a new Will.**
- 3. If you are not making provision for a spouse/partner or a former spouse/partner it is possible that he/she could make a claim against your estate. If this is the case please seek further advice from us.**
- 4. Please ask if you want help in filling in this form or require more information**