

Will Questionnaire

In order that we may prepare a Will which suits your circumstances, we should be grateful if you would complete as much as possible of this questionnaire. Please continue on a separate sheet, if necessary, indicating the section to which the information relates. Copies of existing Wills and other relevant documents should be provided, if possible.

PART 1 – PERSONAL DETAILS

	Husband / Partner Individual	Wife / Partner
Full name		
Address		
Email address		
Home telephone number		
Daytime telephone number		
Date of birth		
Place of birth		
Maiden name (if appropriate)		
Country of residence		
Location of any previous Will		
Marital status - Insert whether married or unmarried or civil partnership		
Have you been married before?		
If yes, were you widowed?		
If yes, what date?		
Do you have children together?		
If yes, please insert their names and dates of birth		

	Husband / Partner Individual	Wife / Partner
Are they natural / adopted?		
Do you have children from a previous relationship / marriage / civil partnership?		
If yes, please insert their names and dates of birth		
Are they natural / adopted / illegitimate?		
Insert details of any grandchildren - names and dates of birth and the name of their parent		
Your occupation		
Are you working / retired / semi-retired?		
Do you have a pension? Please provide brief details.		
If you are not working, are you on income drawdown from your Pension Fund?		

PART 2 – ASSETS & GIFTS

It would be helpful if you could provide details of your assets and gifts made so that we can tailor the Will to meet our requirements and give Inheritance Tax advice, if wanted.

	Husband / Partner Individual	Wife / Partner	Joint - Yes / No
1. Assets - brief details including rough values			
Main residence: <ul style="list-style-type: none"> • Any outstanding mortgage secured on it? • Location of the title deeds? 			
Any other property or land?			
Personal possessions: <ul style="list-style-type: none"> • Antiques • Jewellery • Motor vehicles • Boats etc 			
Stocks and shares: <ul style="list-style-type: none"> • Are they managed? • If so, by whom? 			
Unit Trusts			
Bonds			
Bank accounts			
Building Society accounts			

	Husband / Partner Individual	Wife / Partner	Joint - Yes / No
<p>Life policies</p> <ul style="list-style-type: none"> ● What are they? <ul style="list-style-type: none"> - term policies - endowments - whole of life ● If term or endowment when do they expire? 			
<p>Business property</p> <ul style="list-style-type: none"> ● What is the nature of your business? ● Partnership or Limited Company? ● Are you trading or a property investment company? 			
<p>Agricultural property</p>			
<p>Cryptoassets/currencies:</p> <ul style="list-style-type: none"> ● Where to be found/UK-sited ● Proof of ownership ● Held on trust ● Blockchain address & private key 			
<p>Foreign assets:</p> <ul style="list-style-type: none"> ● Land ● Investments ● Savings 			
<p>Assets in trust:</p> <ul style="list-style-type: none"> ● Of which you are a beneficiary ● Over which you can direct the distribution or benefit 			

	Husband / Partner Individual	Wife / Partner
2. Gifts		
Have you used your £3,000 annual capital allowance this tax year and/or for the previous year?		
Do you make regular gifts out of your surplus income?		
Have you made capital gifts (i.e. cash or assets) exceeding £3,000 per annum within the past 7 years?		
If so, provide details of the asset, value, date of gift and to whom.		
	Husband / Partner Individual	Wife / Partner
If to a trust, provide details of the Trust.		
Have you been the beneficiary of a Will within the past 2 years?		
If yes, please provide brief details.		

PART 3 - CONTENTS OF WILL

	Husband / Partner Individual	Wife / Partner
1. Funeral / burial requirements - organs for medical use or research?		
2. Executors and Trustees: <ul style="list-style-type: none"> • Who do you wish to collect in your assets and distribute them and, if there are to be continuing trusts, who do you want as trustees? Please include the position for: <ol style="list-style-type: none"> 1. First death (e.g. surviving spouse/partner?) 2. Second death - we recommend at least two named individuals 		
3. If you have minor children, who would you wish as guardian(s) to be responsible for their care and custody until they reach 18 if neither of you are alive?		
4. Specific gifts: <p>Personal chattels (jewellery, antiques, boats etc)</p> <ul style="list-style-type: none"> • What? • To whom? (name and address) <p>Business or agricultural property - details</p>		

<p>5. Gift of money:</p> <ul style="list-style-type: none"> ● Details of amount ● Beneficiary's name and address <p>Is this to take place on your death whether or not survived by your spouse / partner?</p>		
<p>6. The rest of your estate:</p> <ul style="list-style-type: none"> ● Do you want to leave it outright to your spouse / partner to deal with as they please? ● Or do you want to determine where your assets ultimately pass on the second death? ● If no spouse / partner or children, who do you want to inherit and in what shares? 		
<p>If no surviving spouse / partner, is it to pass to your children?</p> <ul style="list-style-type: none"> - At what age? - In what shares? 		
<p>Who will inherit your estate if neither your spouse / partner nor children survive you?</p> <p>In what proportions?</p>		
<p>Additional comments or relevant information</p>		

PART 4 – OTHER INFORMATION

	Husband / Partner Individual	Wife / Partner
<p>1. Do you have a Power of Attorney in place?</p> <p>If so, what type:</p> <ul style="list-style-type: none"> ● General Power of Attorney ● Enduring Power of Attorney ● Lasting Power of Attorney <p>If so, provide details of:</p> <ul style="list-style-type: none"> - Its' date - Whereabouts - Name(s) of Attorney(s) 		
<p>2. Do you have a Living Will / Advance Directive?</p> <p>If so, when was it made?</p>		

Date of completion of this form

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