

WILLS QUESTIONNAIRE

This questionnaire is designed to provide an overview of your current situation. This will enable us to effectively advise you at the meeting. Please answer all questions accurately. Any queries you have can be dealt with at our meeting.

<u>Client's Details</u>	
Full name (including middle names and title)	
Are you currently, or were you previously, known by any other names?	
Home address	
Date of Birth	
Where would you consider your country of residence to be?	

<u>Current Wills</u>	
Have you previously made a Will?	Yes/No
If so, did you make a Codicil?	Yes/No
Have you married or entered a Civil Partnership (CP) since you made your last Will?	Yes/No
Have you divorced or dissolved a CP since your last Will?	Yes/No
Looking at your old Will, do you feel there are significant changes required?	Yes/No

<u>Personal Circumstances</u>	
Are you expecting to get married/enter a CP in the near future? If so, provide your partner's full name.	
Are you currently married/in a CP? If so, provide your partner's full name.	
Are you cohabiting with your partner, but not married? If so, provide your partner's full name.	

<u>Worldwide Wills</u>	
Do you want your new Will to deal with any assets you own abroad?	
Do you want your assets abroad to be dealt with under a Will in that country and to exclude them from your Will here?	

<u>Funeral Wishes</u>	
What do you want to happen to your body? Please delete as appropriate.	Burial Cremation Woodland/eco burial Donate body to scientific research Donate body for organ transplant Any other instructions?

<u>Funeral or Care Plans</u>	
Please provide details of any funeral plan you have.	
Please provide details of your burial plot, if you have one.	

<u>Executors</u>	
Who do you want to be your executor(s)? You can appoint up to 4 executors, however this can cause delays when they administer your estate. Most people choose to have 2 executors.	
If your executor(s) should die before you, or cannot act for any reason, who would you like to replace them?	

Children

Do you have children? If so, please provide their full names and dates of birth.

Do you have grandchildren? If so, please provide their full names and dates of birth.

Who would you like to act as a Guardian for your children under the age of 18 should you and the other parent die? You should ask the other parent and proposed Guardian about this proposal.

Do you act as a Guardian to someone else's children? If so, who would you like to take over this role when you die?

Personal Possessions

Do you have personal possessions that you would like to give to certain people or groups? For example, giving a ring to a child or giving a collection of vinyl records to a music society. Please give details of all your personal possessions and their value, and who you would like them to be given to when you die.

Who would you prefer deals with the distribution of your personal possessions? Please delete as appropriate.

Your partner
Executor(s)
Someone else

Who should pay for any costs associated with distributing your personal possessions?

Your estate
The person(s)/group(s) receiving the gift(s)

Pets

If you have a pet, what do you want to happen to it when you die?

Give to a friend/relative with a monetary gift to cover costs of upkeep
Give to an animal charity with a donation for costs of upkeep
Ask Executors to Euthanise
Other (provide details)

Do you have any important/helpful information regarding the care of your pet which you wish to leave?

Cash Gifts

Do you want to give any cash gifts to any person? If so, please provide the person's details below.

Charity Gifts

Do you wish to give a gift to a charity? If a gift of more than 10% is left to a charity this may mean your beneficiaries are able to claim an inheritance tax reduction.

Buildings and Land

Do you own any buildings or land? This can include your main home, second homes, rental properties you own etc. Please give details below and note the people you would like them to be left to.

Your Home

Address

Do you own your home?
Please delete as appropriate.

Sole owner
Joint owner (joint tenants)
Joint owner (tenants in common)
Not sure

Name of the joint owner:

Value of your home/share of the home.

Who would you like the property to be left to?

Other Properties

Address

Ownership

Sole owner
Joint owner (joint tenants)
Joint owner (tenants in common)
Not sure

Name of the joint owner:

Value of the property/share of the property

Who would you like the property to be left to?

Foreign Property

Do you own a foreign property?

Sole owner
Joint owner (joint tenants)
Joint owner (tenants in common)
Not sure

Name of the joint owner:

Value of your foreign property/share of the foreign property

Who would you like the property

to be left to?	
Have you made a Will, or sought legal advice, in the country where the property is located?	
<u>Agricultural Property</u>	
Type of property, e.g farmhouse, horse stud, arable land etc.	
How are the assets owned?	Sole trader Company – who are the shareholders? Partnership – who are the partners?
Value of the property/your share of the property?	
How long have you owned the agricultural property?	
Who would you like the property to be left to?	

<u>Right to Occupy</u>	
You can allow someone to live in your property once you have died.	
If you would like someone to be able to live in your property after you have died, please choose from the following options. Delete as appropriate.	Right to occupy for the rest of their life, with no trust Right to occupy for the rest of their life under a life interest trust Right to occupy for a defined period of time e.g. until death, for one year, until they find somewhere else etc. Unsure – please provide me with further information

<u>Business Assets</u>	
Type of business	
How are the assets owned? Delete as appropriate.	Sole trader Company - who are the shareholders? Partnership – who are the partners?
How long have you owned the business?	
What is the value of your share in the business/part of the business?	

<u>Life Assurance</u>	
Please provide details of any policies you have e.g. endowment policy linked to mortgage debt	
What is the surrender value of the policy?	

<u>Pension Death Benefits</u>

Have you nominated someone to benefit? If yes, who?	
Have you discussed your options with anyone? If yes, give details of options.	

Cash in Bank	
Please provide details of you accounts (bank, savings or current) and their approximate values.	

Shares and Investments	
Please provide details of your shares/investments, the provider, and their values.	

Trusts	
Are you the beneficiary of any trusts? If so, please give details including the value of the trust.	
Have you set up any trusts? If so, please give details including the value of the trust.	
Do you expect to inherit from someone else's estate? If so, please estimate the value.	

Loans made to others	
Have you made any loans that have not been repaid (including loans to relatives)? If yes, please provide the name of the person, the value of the loan, and the debt outstanding.	
Do you want to release the person from their liability when you die, so they do not need to repay the loan?	

Liabilities and Debts Schedule

<p>Please provide the following information for each mortgage you have:</p> <ul style="list-style-type: none"> - The property it is secured over - The value of the mortgage - The terms (e.g. joint mortgage, interest only etc) - The redemption date 	
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Loans	
<p>Please provide the following information for any outstanding loans you have (including loans from relatives):</p> <ul style="list-style-type: none"> - Amount of the loan - Date the loan was made - Whether there is a written agreement - The terms (e.g. any interest payable, when it is due for repayment) 	

Credit Card Debts	
<p>Please provide details of any longstanding credit card debts you have. Do not include credit cards which you will be paying off in the near future.</p>	

Gifts Made to Others	
<p>Have you made any significant gifts to anyone (over £3,000.00 per year), within the last seven years? If so, please provide the value of the gifts and the dates they were made.</p>	
<p>If you have made gifts of this kind, the recipient may need to pay inheritance tax on it. Do you want the recipient to pay this tax, or for it to be paid from your estate?</p>	

Any other Assets

Please provide details of any other assets not previously mentioned.

Residuary Estate

This is what is left after the other gifts, funeral and other expenses have been paid. Who do you want to inherit what is left?

Partner
Children in equal shares (at a specific age or no specific age)
Grandchildren in equal shares (at a specific age or no specific age)
Charities

Vulnerable Beneficiaries

Are any of your beneficiaries vulnerable? This could simply be someone who cannot manage money very well. Any assets gifted to them could be held in a trust for them.

Vulnerable beneficiary's name.

Details of why they are vulnerable (e.g. disabled, addictions, cannot manage money).

Protection of Assets

Are any of your beneficiaries likely to divorce or become bankrupt in the near future?

If yes, there are steps that can be taken to protect their inheritance.

Children from previous relationships

You can provide for children not blood related from previous relationships, and other children who are not blood related but are treated as a child of the family (e.g. stepchildren). Please provide their details.

Failure of a gift

If a beneficiary dies (or a charity or society dissolves) before receiving their gift, what would you like to happen to it?

Give to a different beneficiary (please provide details)
Other

Third Party Claims

Are you aware of any claims other people may have over your property (for example have you promised to leave your property to anyone when you die)?
If yes, please give details including the value of the property.

Power of Attorney

Have you made an Enduring Power of Attorney or Lasting Power of Attorney?

Miscellaneous

Please provide details of any unusual circumstances, or anything else you believe we should know about.

Do you have any questions you wish to raise at our meeting?

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