

WILLS QUESTIONNAIRE – CLIENT REPLIES

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.

Client's Details	
Full name (including middle names and title)	{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD FW_WIL_CLIDETS_FW_WIL_MDLNAME } { MERGEFIELD LINKNAME_SURNAME_1 }
Are you currently, or were you previously, known by any other names?	{ MERGEFIELD FW_WIL_CLIDETS_FW_WIL_OTHNMS }
Home address	{ MERGEFIELD CLIENT_HOUSE } { MERGEFIELD CLIENT_AREA } { MERGEFIELD CLIENT_POSTAL_TOWN } { MERGEFIELD CLIENT_COUNTY } { MERGEFIELD CLIENT_POSTCODE }
Date of Birth	{ MERGEFIELD FW_WIL_CLIDETS_FW_WIL_DOB }
Where would you consider your country of residence to be?	{ MERGEFIELD FW_WIL_CLIDETS_FW_WIL_CORESI }

Current Wills	
Have you previously made a Will?	{ MERGEFIELD FW_WIL_WILLS_FW_WIL_PREVWILL }
If so, did you make a Codicil?	{ MERGEFIELD FW_WIL_WILLS_FW_WIL_CODICIL }
Have you married or entered a Civil Partnership (CP) since you made your last Will?	{ MERGEFIELD FW_WIL_WILLS_FW_WIL_MSLW }
Have you divorced or dissolved a CP since your last Will?	{ MERGEFIELD FW_WIL_WILLS_FW_WIL_DIVLW }
Looking at your old Will, do you feel there are significant changes required?	{ MERGEFIELD FW_WIL_WILLS_FW_WIL_SCLW }

Personal Circumstances	
Are you expecting to get married/enter a CP in the near future? If so, provide your partner's full name.	{ MERGEFIELD FW_WIL_PERCIRC_FW_WIL_EXPMAR } { MERGEFIELD FW_WIL_PERCIRC_FW_WIL_PARTNM }
Are you currently married/in a CP? If so, provide your partner's full name.	{ MERGEFIELD FW_WIL_PERCIRC_FW_WIL_MARR } { MERGEFIELD FW_WIL_PERCIRC_FW_WIL_MARRNM }
Are you cohabiting with your partner, but not married? If so, provide your partner's full name.	{ MERGEFIELD FW_WIL_PERCIRC_FW_WIL_CIVPART } { MERGEFIELD FW_WIL_PERCIRC_FW_WIL_CIVNAME }

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

<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? { MERGEFIELD FW_WIL_FUNWISH_FW_WIL_FOW } { MERGEFIELD FW_WIL_FUNWISH_FW_WIL_FWB } { MERGEFIELD FW_WIL_FUNWISH_FW_WIL_FWDON }

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

<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.	{ MERGEFIELD FW_WIL_EXECUTOR_FW_WIL_EXEC1 } { MERGEFIELD FW_WIL_EXECUTOR_FW_WIL_EXEC2 } { MERGEFIELD FW_WIL_EXECUTOR_FW_WIL_EXEC3 } { MERGEFIELD FW_WIL_EXECUTOR_FW_WIL_EXEC4 }
If your executor(s) should die before you, or cannot act for any reason, who would you like to replace them?	{ MERGEFIELD FW_WIL_EXECUTOR_FW_WIL_EXEC_DIE }

Children	
Do you have children? If so, please provide their full names and dates of birth.	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_CHILDREN }
Do you have grandchildren? If so, please provide their full names and dates of birth.	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_GCHILDRE }
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.	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_GUACHD1 }
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?	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_GUACHD2 }

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.	
{ MERGEFIELD FW_WIL_PPOSPET_FW_WIL_PERSPOSS }	
Who would you prefer deals with the distribution of your personal possessions? Please delete as appropriate.	Your partner Executor(s) Someone else { MERGEFIELD FW_WIL_PPOSPET_FW_WIL_PERSDIST }
Who should pay for any costs associated with distributing your personal possessions?	Your estate The person(s)/group(s) receiving the gift(s) { MERGEFIELD FW_WIL_PPOSPET_FW_WIL_PERCOSTS }

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 { MERGEFIELD FW_WILS_PETS_FW_WIL_PET }
Do you have any important/helpful information regarding the care of your pet which you wish to leave?	{ MERGEFIELD FW_WILS_PETS_FW_WIL_PETDETS }

Cash Gifts	
Do you want to give any cash gifts to any person? If so, please	{ MERGEFIELD FW_WIL_CSHCHA_FW_WIL_CASHGIFT }

provide the person's details below.	
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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.	{ MERGEFIELD FW_WIL_CSHCHA_FW_WIL_CHARGIFT }

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	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_HMADD }
Do you own your home? Please delete as appropriate.	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_HMOWN } Name of the joint owner: { MERGEFIELD FW_WIL_BUILAN_FW_WIL_HMJOSETS }
Value of your home/share of the home.	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_HMVALUE }
Who would you like the property to be left to?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_HMRECIP }
Other Properties	
Address	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_OTHADD }
Ownership	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_OTHOWN } Name of the joint owner: { MERGEFIELD FW_WIL_BUILAN_FW_WIL_OPJOSETS }
Value of the property/share of the property	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_OTHVALUE }
Who would you like the property to be left to?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_OTHRECIP }
Foreign Property	
Do you own a foreign property?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_FORPROWN } Name of the joint owner: { MERGEFIELD FW_WIL_BUILAN_FW_WIL_FPJOSETS }
Value of your foreign property/share of the foreign property	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_FPROPVAL }
Who would you like the property to be left to?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_FPROPPEC }
Have you made a Will, or sought	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_FLEGADVI }

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.	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGPROPER }
How are the assets owned?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGRIOWN }
Value of the property/your share of the property?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGRIVALU }
How long have you owned the agricultural property?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGRIAGE }
Who would you like the property to be left to?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGRIRECI }

<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.	<p>Right to occupy for the rest of their life, with no trust</p> <p>Right to occupy for the rest of their life under a life interest trust</p> <p>Right to occupy for a defined period of time e.g. until death, for one year, until they find somewhere else etc.</p> <p>Unsure – please provide me with further information</p> <p>{ MERGEFIELD FW_WIL_RTO_FW_WIL_RTO }</p> <p>{ MERGEFIELD FW_WIL_RTO_FW_WIL_RTODETS }</p>

<u>Business Assets</u>	
Type of business	{ MERGEFIELD FW_WIL_BUSASSET_FW_WIL_TYPEBUS }
How are the assets owned? Delete as appropriate.	<p>Sole trader { MERGEFIELD FW_WIL_BUSASSET_FW_WIL_SOLET }</p> <p>Company - who are the shareholders? { MERGEFIELD FW_WIL_BUSASSET_FW_WIL_CMPNY }</p> <p>Partnership – who are the partners? { MERGEFIELD FW_WIL_BUSASSET_FW_WIL_PRTNR }</p>
How long have you owned the business?	{ MERGEFIELD FW_WIL_BUSASSET_FW_WIL_LOT }
What is the value of your share in the business/part of the business?	{ MERGEFIELD FW_WIL_BUSASSET_FW_WIL_SHVALUE }

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

Pension Death Benefits

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

Cash in Bank

Please provide details of you accounts (bank, savings or current) and their approximate values.	{ MERGEFIELD FW_WIL_CASHBNK_FW_WIL_CASHDET } { MERGEFIELD FW_WIL_CASHBNK_FW_WIL_CASHVAL }
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Shares and Investments

Please provide details of your shares/investments, the provider, and their values.	{ MERGEFIELD FW_WIL_SHINVEST_FW_WIL_SHAINV }
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Trusts

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

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.	{ MERGEFIELD FW_WIL_LOANOTHR_FW_WIL_LOANOTHR }
Do you want to release the person from their liability when you die, so they do not need to repay the loan?	{ MERGEFIELD FW_WIL_LOANOTHR_FW_WIL_LOANOTH1 }

Liabilities and Debts Schedule

Please provide the following information for each mortgage you have:

- The property it is secured over
- The value of the mortgage
- The terms (e.g. joint mortgage, interest only etc)
- The redemption date

{ MERGEFIELD FW_WIL_LIBDEBTS_FW_WIL_LIBDEINF }

Loans

Please provide the following information for any outstanding loans you have (including loans from relatives):

- 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)

{ MERGEFIELD FW_WIL_LOANS_FW_WIL_LOANS }

Credit Card Debts

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.

{ MERGEFIELD FW_WIL_CARDDEBT_FW_WIL_CCDEBT }

Gifts Made to Others

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.

{ MERGEFIELD FW_WIL_GIFTOTHR_FW_WIL_GIFTOTH1 }

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,

{ MERGEFIELD FW_WIL_GIFTOTHR_FW_WIL_GIFTOTH2 }

or for it to be paid from your estate?	
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<u>Any other Assets</u>	
Please provide details of any other assets not previously mentioned.	{ MERGEFIELD FW_WIL_OTHRASS_FW_WIL_OTHRASS }

<u>Residuary Estate</u>	
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?	{ MERGEFIELD FW_WIL_RESEST_FW_WIL_RESEST }

<u>Vulnerable Beneficiaries</u>	
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.	{ MERGEFIELD FW_WIL_VULBEN_FW_WIL_VULNAME }
Details of why they are vulnerable (e.g. disabled, addictions, cannot manage money).	{ MERGEFIELD FW_WIL_VULBEN_FW_WIL_VULDET }

<u>Protection of Assets</u>	
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.	{ MERGEFIELD FW_WIL_PROASS_FW_WIL_PROASS }

<u>Children from previous relationships</u>	
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.	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_OTHCHLD }

<u>Failure of a gift</u>	
If a beneficiary dies (or a charity or society dissolves) before receiving their gift, what would you like to happen to it?	{ MERGEFIELD FW_WIL_FAILGIFT_FW_WIL_FAILGIFT }

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.

{ MERGEFIELD FW_WIL_3RDPRTYC_FW_WIL_3RDPRTYC }

Power of Attorney

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

{ MERGEFIELD FW_WIL_PWRATTOR_FW_WIL_PWRATTOR }

Miscellaneous

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

{ MERGEFIELD FW_WIL_MISC_FW_WIL_MISC }

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

{ MERGEFIELD FW_WIL_MISC_FW_WIL_QUEST }