

# Osprey Approach: Will Writing

This help guide was last updated on  
Aug 6th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=15463>

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This workflow assists with the management of a Wills instruction, by collecting all necessary information via a Questionnaire and using that to generate documents and correspondence throughout the matter lifecycle.

#### ALLOCATE A CUSTOM QUESTIONNAIRE

##### SINGLE OR DOUBLE WILL FW\_WIL

Is this a single will or mirror wills?

Please select

Please select

Single

Mirror

✓ Submit

Cancel

There is a pending questionnaire to fill in. Would you like to fill it in now?

- ☒ Yes, I want to submit the information now
- ☐ No, not at this time
- ☐ Don't ask me again

OK



##### 01 - ABOUT YOU

Title:	Automatically Filled In from Osprey
Forename:	Automatically Filled In from Osprey
Initials:	Automatically Filled In from Osprey
Surname/Company Name :	Automatically Filled In from Osprey

Have you ever been known by any other names?

Other/Previous Name(s)?:	
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**Your telephone number so we can contact you:**

Phone Number:

**Your Address:**

House:

Postal Town:

County:

Postcode:

**02 - CURENT WILLS**

Have you made a Codicil?:

Have you divorced/dissolved CP since last will?:

Have you married/entered a CP since last will?:

Have you previously made a will?:

Are there significant changes to last will made?:

**03 - PERSONAL CIRCUMSTANCES**

Are you expecting to get married or enter a CP in :

If so, 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 marr:

If so, provide your partner's full name.:

#### 04 - WORLDWIDE WILLS

Does your Will include assets abroad?:

Your assets abroad to be excluded from will?:

#### 05 - FUNERAL WISHES

Funeral Wishes - burial/cremation etc:

Funeral wishes - organ/body donation:

Funeral wishes - any other instructions?:

#### 06 - FUNERAL OR CARE PLANS

Provide details of any burial plot if applicable.:

Provide details of any funeral plan you may have.:

#### 07 EXECUTORS

Who do you want to be your executor(s)?

You can appoint up to 4 executors.

This can cause delays when they administer your estate.

Executor 1 Name:

Executor 2 Name:

Executor 3 Name:

Executor 4 Name:

**If your executor(s) should die before you,  
or cannot act for any reason, who would  
you like to replace them?**

Who would you like to  
replace them?:

**08 CHILDREN**

Provide full name and D.O.B  
of any children:

Provide full name and D.O.B  
of any grandchildren.:

Name a Guardian for your  
children.:

Name a Guardian for your  
Guardian children:

09 PERSONAL POSSESSIONS

Do you have personal possessions you would like to give?

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

Costs for possessions distribution paid by:

Please Select▼

Who will distribute your personals possessions?:

Please Select▼

Please list personal possessions to be distributed:

10 PETS

What would you like to happen to your pets:

Please Select▼

Important information about the care of your pets:

11 CASH AND CHARITY GIFTS

Do you want to give any cash gifts to any person?

If so, please provide the person’s details below.

Do you want to give any cash gifts to any person? :

**Do you want to give any cash gifts to any 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.**

Do you wish to give a gift to a charity? :

## **12 BUILDINGS AND LAND**

**Do you own any buildings or land?**

**This can include your main home, second homes, rental properties you own etc.**

**Provide details and note the people you would like to have them.**

### **Your Home**

Your home address:



Do you own this property?:

Please Select



Name of joint owner:

Value of your home/share of the home.:

Who would you like the property to be left to?:

**Other Properties**

Other property address:

Do you own your home?:

Please Select

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?:

Please Select

Name of the joint owner: :

Value of your foreign  
property/share of the  
foreig:

Who would you like the  
property to be left to?:

Have you or sought legal  
advice in the country?:



### Agricultural Property

Type of property, e.g farmhouse:	<input type="text"/>
How are the assets owned?:	<div>Please Select ▼</div>
Value of the property/your share of the property?:	<input type="text"/>
How long have you owned the agricultural property?:	<input type="text"/>
Who would you like the property to be left to?:	<input type="text"/>

### Right to Occupy

If you would like someone to be able to live in your  
property after you have died, please choose from  
the following options.

Under what terms are they allowed to stay:	<div>Please Select ▼</div>
---	----------------------------

### 13 - BUSINESS ASSETS

#### How are the assets owned?

Sole Trader:	<div>Please Select ▼</div>
Company - who are the shareholders?:	<div><div></div></div>
Partnership - who are the partners?:	<div><div></div></div>
How long have you owned the business?:	<input type="text"/>
What is the value of your share/part?:	<input type="text"/>

#### 14 LIFE ASSURANCE

Please provide details of an policies you have

e.g. linked to mortgage debt.

Life Assurance:

What is the surrender  
value?:

#### 15 PENSION DEATH BENEFITS

Have you nominated someone to benefit? If yes who?

Full Name:

Have you discussed your options with anyone? If yes:

Details:

#### 16 CASH IN BANK

Please provide details of your accounts (bank,  
savings or current) and their approximate values.

Details:

Values:

**17 SHARES AND INVESTMENTS**

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

Details:

**18 Trusts**

**Are you the beneficiary of any trusts?**

**If so, please give details including the trusts values.**

Trust Details:

**Have you set up any trusts? If so, please give  
details including the value of the trust.**

Trust Values:

**Do you expect to inherit from someone else's estate?**

**If so, please estimate the value.**

Inheritance details:

### 19 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 and the debt outstanding

Details:

Do you want to release the person from their liability when you die, so they do not need to repay the loan.

Response:

Please Select



### 20 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/interest only etc)
- The redemption date

Details:

## 21 LOANS

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

- Amount of loan
- Date the loan was made
- Whether there is a written agreement
- The terms (e.g. any interest payable, repayment date)

Details:

## 22 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.

Details:

## 23 GIFTS MADE TO OTHERS

Have you made any significant gifts to anyone

(over £3,000.00 per year), within the last seven years?

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?

Details:

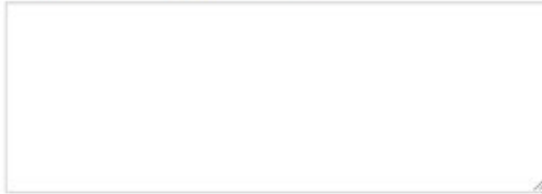
Pay Tax from Estate?:

Please Select ▼

## 24 ANY OTHER ASSETS

Please provide details of any other assets not mentioned

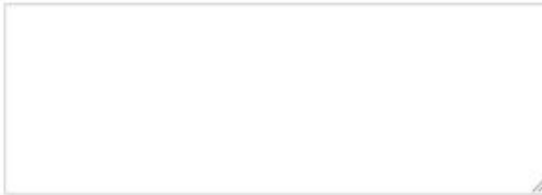
Details:



## 25 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? This could be a partner, children in equal shares (at a specific age or n specific age), grandchildren in equal shares (at a specific age or no specific age) or charities.

Details:



## 26 VULNERABLE BENEFICIARIES

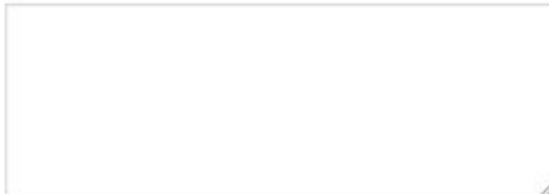
Are any of your beneficiaries vulnerable? This could simply be someone who cannot manage money very well. Any assets gifted to them could be held in trust for them.

Vulnerable beneficiary's name:



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

Details:

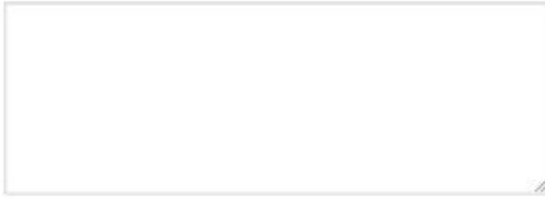


## 27 PROTECTION OF ASSETS

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.

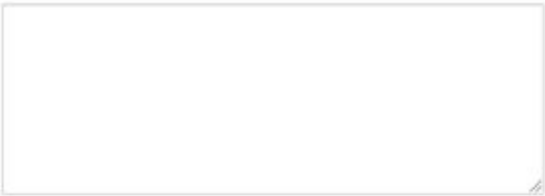
Details:



## 28 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.

Provide details of children from past relationship:

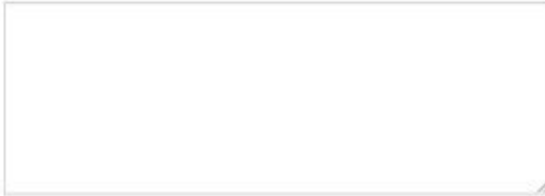


## 29 FAILURE OF A GIFT

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 (please provide details)

Details:



### 30 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 property value.

Details:

### 31 POWER OF ATTORNEY

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

Selection:

Please Select



### 32 MISCELLANEOUS

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

Details:

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

Questions:



CAPACITY FW\_WIL

Is this a single will or mirror wills?

Please select

Please select

Single

Mirror

Is a medical report required to determine capacity

Please Select

Please Select

Yes

No

Doctor 1 title

Doctor 1 initials

Doctor 1 forename

Doctor 1 surname

Doctor 1 address

Doctor 2 title

Doctor 2 initials

Doctor 2 forename

Doctor 2 surname

Doctor 2 address

✓ Submit

Cancel

Please note: Mark the task as complete once you have drafted the Will

#### **Documents available within Document Production**

- FW\_WIL Client blank letter
- Client Initial Questionnaire FW – a questionnaire which can be used at the first meeting or sent to the client for completion prior to the first meeting

# **Web Questionnaire Tick List**

## **List of information required to complete Web Questionnaire**

Please use this tick list to ensure you have the required information prior to completing the questionnaire.

Details of any current Will/Codicil you have

Whether you want your new Will to deal with any foreign assets you have and details of those assets (if applicable)

Your funeral wishes

Details of any funeral or care plans you have

Who you would like to appoint as your Executors. Their full name and address are required.

Names and dates of birth of any children or grandchildren

If you have minor children, anyone you would wish to appoint as a Guardian. Their full name and address are required.

If you have a pet, any important information regarding its health/care after you die

For cash gifts, the persons full name and address is required.

Consider any charities you may wish to give a gift to

For properties you own, please ascertain how the property is held (whether it is in your sole name or jointly owned), the value of the property and who you would like to leave it to. This includes second properties and foreign properties you own.

For any agricultural properties, you will need to confirm how the property is owned, how long it has been owned for and who you would like it to be left to

Consider whether you would like to allow someone to live in your property for a period of time after you have died e.g. allowing your spouse to live in the property until death, when it would then be passed to your child

All business assets you have, including how the asset is owned, the length of ownership and the value

All life assurance policies together with their surrender value

Names and addresses of people you have nominated for pension death benefits

Bank accounts, including savings and current account, including their current value

Details of all shares and investments, including the provider and the current value

If you are the beneficiary of any trusts, details are required together with the value

Details of trusts you have set up, and the value

The value of any likely inheritance you expect to receive from someone else's estate

The value of any loan you have made to a person and the debt outstanding, including their name and address. Consider whether you wish that person to repay the loan after you have died.

Details of any loans you have taken out, for example bank loans or mortgages. If the loan is secured against property, then details of the property will be required. Ensure you have the total amount borrowed, the date the amount is due to be repaid and the terms of the loan.

Debts incurred through credit cards (not including those which you are imminently due to repay)

Consider if you have made any gifts over £3,000.00. Details of the gift value and date given are required. If any inheritance tax is due, please consider if you would like the person to pay the tax or whether it should come from your estate.

Details of any other assets not previously mentioned. Include a brief description and value of the asset.

Consider who you would like to receive your residual estate (what is left after all the specific gifts and funeral expenses etc). This could be a spouse, children or grandchildren.

Are any of your intended beneficiaries considered 'vulnerable'? You must provide details as to why you believe they are vulnerable, e.g. they may be disabled, have addiction problems, cannot manage money etc.

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

Do you wish to provide for any children who are not blood related to you? This could be children from a previous relationship, or step-children in your current relationship. Their name, date of birth and address will be required.

Consider what you would like to happen to a gift if the intended beneficiary dies (or in the case of a charity, dissolves). Details of the substitute are required.

Details of any claims by third parties over any property you own.

Miscellaneous – consider any other unusual circumstances you believe your solicitor should be aware of.

Miscellaneous – consider any specific questions you would like your solicitor to answer.

# **Client re. Questionnaire**

# Completion



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Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \* MERGEFORMAT }

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 },  
{ MERGEFIELD CALCULATION\_ADDRESS }  
" "{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } {  
MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 },  
{ MERGEFIELD CALCULATION\_ADDRESS }" }

Dear { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{  
MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 }," "{  
MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & {  
MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 }," }

**Re:** { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "Your  
Will" "Your Wills" }

I will shortly be providing you with an online questionnaire to complete, prior to attending our  
office for our initial meeting.

The purpose of the questionnaire is to gather all relevant information that will be necessary  
to consider when making a Will. It will also provide me with the opportunity of considering  
your situation prior to your attendance so I may give you the best possible advice relevant to  
your circumstances when we meet.

The questionnaire is very detailed, so I have attached a tick list of items which you will need  
to have to hand/have considered before you complete the questionnaire. The questionnaire  
must be completed in one sitting as progress cannot be saved as you go along, so I would  
advise that you set aside an hour to go through the questionnaire.

Please answer the questions to the best of your knowledge. If there are any questions  
which you are unsure of, you can leave these blank and we can discuss them further during  
our meeting.

If you have any issues, please do not hesitate to contact me.

Yours sincerely,

{INCLUDETEXT

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{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME\*Upper }
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# **Client Care Letter - Single Will**

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{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
MERGEFIELD LINKNAME\_SURNAME\_1 },  
{ MERGEFIELD CALCULATION\_ADDRESS }

Dear { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 },

**Re: { MERGEFIELD MATTER MATTER\_DESCRIPTION }**

Thank you for your instructions in connection with the preparation of your Will. Please take the time to carefully read this letter and accompanying documentation about your matter.

### **Responsibility for your work**

I am { MERGEFIELD CALCULATION\_FEE\_EARNER\_DESCRIPTION }, a { MERGEFIELD  
CALCULATION\_STATUS\_DESCRIPTION } in the Private Client Department. I will be responsible for the work conducted on your matter.

My secretary/assistant, NAME, will be able to assist you should I be unavailable.

### **Your Instructions**

### **Our Advice**

### **Timescales**

From previous experience, I expect this matter to take between two and three weeks to complete.

### **Costs**

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_MEDREP } = "No" "I shall charge  
£150.00 plus VAT to draft your Will. I anticipate the following disbursements may be  
necessary:

- Copy Title Deeds from Land Registry - £3.00 per Title Deed
- Mileage at £0.45 per mile (if I must travel out of the office to visit you)

The total costs will therefore be £180.00 including VAT, plus any disbursements." "{ IF {  
MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_MEDREP } = "Yes" "I shall charge £150.00  
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{INCLUDETEXT

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I shall also make an additional charge of £75.00 plus VAT to cover our costs of liaising with your GP/Consultant. Your GP/Consultant will also make a charge for the preparation of their report. I shall liaise with them and notify you of their costs.

I anticipate the following disbursements may be necessary:

- Copy Title Deeds from Land Registry - £3.00 per Title Deed
- Mileage at £0.45 per mile (if I must travel out of the office to visit you)

The total costs will therefore be £270.00 including VAT, plus any disbursements." "" }" }My costs in this matter are £\*

My charge out rate is £\*

### **Client Identity Checks**

In order to comply with government regulations regarding money laundering, we are required to obtain evidence of your identity and address (and occasionally other parties) even if you are known to us personally.

As evidence of your identity, I will require from you either your **original** current passport or **original** photographic driving licence. As proof of your address, I will require a utility bill or bank statement dated within the last three months. If you are unable to provide an **original** paper statement I can accept online statements, where they are printed in full, and show your names and address clearly. Please note that Sky and Mobile Phone statements cannot be accepted as proof of address.

Yours sincerely,

{ MERGEFIELD "CALCULATION\_FEE\_EARNER\_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME\\*Upper }

# **Client Care Letter - Mirror Will**

# Client 1

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{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
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Dear { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 },

**Re: { MERGEFIELD MATTER MATTER\_DESCRIPTION }**

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Yours sincerely,

{ MERGEFIELD "CALCULATION\_FEE\_EARNER\_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME\\*Upper }

# **Client Care Letter - Mirror Will**

## **Client 2**

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client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \* MERGEFORMAT }

{ MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_INITIALS\_2 } {  
MERGEFIELD LINKNAME\_TITLE\_2 },  
{ MERGEFIELD CALCULATION\_ADDRESS }

Dear { MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 },

**Re: Mirror Wills**

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- Mileage at £0.45 per mile (if I must travel out of the office to visit you)

The total costs will therefore be £180.00 including VAT, plus any disbursements." "{ IF {  
MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_MEDREP } = "Yes" "I shall charge £150.00  
plus VAT to draft your Will.

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\2492b148-2893-4778-9796-  
28420a53835d\\footer.doc"

I shall also make an additional charge of £75.00 plus VAT to cover our costs of liaising with your GP/Consultant. Your GP/Consultant will also make a charge for the preparation of their report. I shall liaise with them and notify you of their costs.

I anticipate the following disbursements may be necessary:

- Copy Title Deeds from Land Registry - £3.00 per Title Deed
- Mileage at £0.45 per mile (if I must travel out of the office to visit you)

The total costs will therefore be £270.00 including VAT, plus any disbursements." "" }" }My costs in this matter are £\*

My charge out rate is £\*

### **Client Identity Checks**

In order to comply with government regulations regarding money laundering, we are required to obtain evidence of your identity and address (and occasionally other parties) even if you are known to us personally.

As evidence of your identity, I will require from you either your **original** current passport or **original** photographic driving licence. As proof of your address, I will require a utility bill or bank statement dated within the last three months. If you are unable to provide an **original** paper statement I can accept online statements, where they are printed in full, and show your names and address clearly. Please note that Sky and Mobile Phone statements cannot be accepted as proof of address.

Yours sincerely,

{ MERGEFIELD "CALCULATION\_FEE\_EARNER\_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME\\*Upper }

# **Doctor Capacity Assessment**

**Client 1**

{INCLUDETEXT

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App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\bbbf6f02-c07d-4b0c-b09c-  
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Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \* MERGEFORMAT }

{ MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_TITLE } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_INT } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_SUR }  
{ MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DRADD }

Dear { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_TITLE } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_SUR }

**Re:** { MERGEFIELD LINKNAME\_FORENAME\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 }

I understand that { MERGEFIELD LINKNAME\_FORENAME\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 } has been your patient for a number of years.

I recently met with { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 } to prepare a Will.

When we met and discussed matters, on some level { MERGEFIELD LINKNAME\_TITLE\_1 }  
{ MERGEFIELD LINKNAME\_SURNAME\_1 } appeared to understand and appreciate why it  
is prudent to prepare a Will, however I am unsure as to whether { MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } does have the  
necessary capacity to instruct me. From speaking to { MERGEFIELD LINKNAME\_TITLE\_1  
} { MERGEFIELD LINKNAME\_SURNAME\_1 }, I think it is arguable that the test for  
testamentary capacity is met.

As you have known { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 } for some time, I welcome your opinion in relation to this matter.

I am sure you are aware of the tests of mental capacity to execute a Will.

If you do conclude that { MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 } has mental capacity to instruct me to prepare a Will, I would be  
grateful if you could please confirm whether you are agreeable to acting as a witness to the  
Will.

Before proceeding with this matter, could you please let me know how much you will charge  
for providing your opinion so that I can agree your costs with { MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 }.

If you require any further guidance please do not hesitate to contact me.

Yours sincerely,

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\bbbf6f02-c07d-4b0c-b09c-  
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```
{ MERGEFIELD "CALCULATION_FEE_EARNER_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME\*Upper }
```

# **Doctor Capacity Assessment**

## **Client 2**

{INCLUDETEXT

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Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \* MERGEFORMAT }

{ MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_TIT2 } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_INT2 } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_SUR2 }  
{ MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DRADD2 }

Dear { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_TIT2 } { MERGEFIELD  
FW\_WIL\_CAPACITY\_FW\_WIL\_DR\_SUR2 }

**Re:** { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 }

I understand that { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 } has been your patient for a number of years.

I recently met with { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 } to prepare a Will.

When we met and discussed matters, on some level { MERGEFIELD  
LINKNAME\_FORENAME\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 } appeared to  
understand and appreciate why it is prudent to prepare a Will, however I am unsure as to  
whether { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 } does have the necessary capacity to instruct me. From  
speaking to { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 }, I think it is arguable that the test for testamentary capacity is  
met.

As you have known { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 } for some time, I welcome your opinion in relation to this matter.

I am sure you are aware of the tests of mental capacity to execute a Will.

If you do conclude that { MERGEFIELD LINKNAME\_FORENAME\_2 } { MERGEFIELD  
LINKNAME\_SURNAME\_2 } has mental capacity to instruct me to prepare a Will, I would be  
grateful if you could please confirm whether you are agreeable to acting as a witness to the  
Will.

Before proceeding with this matter, could you please let me know how much you will charge  
for providing your opinion so that I can agree your costs with { MERGEFIELD  
LINKNAME\_FORENAME\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 }.

If you require any further guidance please do not hesitate to contact me.

Yours sincerely,

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\b7cd0c73-9e10-4f6f-bfcb-  
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{ MERGEFIELD "CALCULATION_FEE_EARNER_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME\*Upper }
```

# **Will Template**

**THE LAST WILL AND TESTAMENT OF**  
**{ MERGEFIELD LINKNAME\_FORENAME\_1 \\*CardText \\*Upper } { MERGEFIELD**  
**LINKNAME\_SURNAME\_1 \\*CardText \\*Upper }**

**PREPARED BY**  
**{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME \\*CardText \\*Upper }**

I, { MERGEFIELD LINKNAME\_FORENAME\_1 \f", " } { MERGEFIELD LINKNAME\_SURNAME\_1 \f", " }, of { MERGEFIELD CLIENT\_HOUSE \f", " } { MERGEFIELD CLIENT\_AREA \f", " } { MERGEFIELD CLIENT\_POSTAL\_TOWN \f", " } { MERGEFIELD CLIENT\_COUNTY \f", " } { MERGEFIELD CLIENT\_POSTCODE }, revoke all former testamentary dispositions made by me. I declare this to be my last Will.

This Will shall only affect my property within the United Kingdom of Great Britain and Northern Ireland. This Will shall not include any of my property outside the UK.

### **DOMICILE**

I confirm I am domiciled in England and Wales.

### **EXECUTORS**

I appoint the following as my executors and trustees:

*(insert relationship, name and address of chosen executors)*

### **REPLACEMENT EXECUTORS**

If any of the executors I have mentioned above are unable to act, I appoint the following replacement executor:

*(Insert relationship, name and address of chosen replacement executor)*

### **GUARDIANS**

If my spouse pre-deceased me, I appoint the following Guardians for my minor children:

*(insert name and address of guardians 1&2)*

### **CHATTELS**

I give to [PERSON] all my chattels not specifically listed in this Will.

### **LEGACIES**

I give the following gifts free of tax:

- a. To [DONEE 1] of [ADDRESS] I give the sum of XX absolutely
- b. To [DONEE 2] of [ADDRESS] I give the sum of XX absolutely
- c. To [DONEE 2] of [ADDRESS] I give the sum of XX on the basis she/he attains the age of [25]
- d. To the charity known as [NAME] of [ADDRESS] and registered charity number [NUMBER] I give the sum of XX for it to use as it sees fit.

Any gifts of this estate are to be free of inheritance tax or other payment, any such payment to be made from my residuary estate.

### **RESIDUE**

I give all my property not aforementioned in this Will or any Codicil annexed hereto to my Trustees to pay my funeral expenses, debts and legacies. Inheritance tax and any other duty or tax should also be paid out of the residue of my estate. I give my Trustees discretion as to whether such payments should come from capital or income.

Any other residue should be passed to [PERSON] of [ADDRESS].



## FURTHER PROVISIONS

ANY FURTHER PROVISIONS SHOULD BE LISTED HERE

**GOVERNING LAW/ADMINISTRATION**

This Will should be governed and administered in accordance with the law of England and Wales.

## EXECUTION

AS WITNESS MY HAND THIS DAY OF  
SIGNED BY { MERGEFIELD LINKNAME\_FORENAME\_1 \\*CardText \\*Upper } { MERGEFIELD  
LINKNAME\_SURNAME\_1 \\*CardText \\*Upper } IN OUR PRESENCE AND THEN BY US

.....

.....

### Witness 1

Signature

Print name

Address

### Witness 2

Signature

Print name

## Address

# Invoice Template

{ MERGEFIELD LINKNAME_TITLE_1 } { MERGEFIELD LINKNAME_INITIALS_1 } { MERGEFIELD LINKNAME_SURNAME_1 } { MERGEFIELD CALCULATION_ADDRESS }	Date: { SET LETTER{ DATE \@ "d MMMM yyyy" } } {ref LETTER \@ "d MMMM yyyy" \ \* MERGEFORMAT }  Invoice e No: Ref: { MERGEFIELD MATTER_FEE_EARNER_ID }/{ MERGEFIELD client_no }/{ MERGEFIELD matter_no }
---	---

	COSTS	RATE	VAT
Fixed fee – preparation of a Will		20%	
<b><u>TOTAL inc. VAT</u></b>	<b>£</b>		

**Client - enc. Draft Will for Approval**

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\8b5a7548-7a61-483f-8d60-  
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Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \ \* MERGEFORMAT }

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 },  
{ MERGEFIELD CALCULATION\_ADDRESS }  
" "{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } {  
MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 },  
{ MERGEFIELD CALCULATION\_ADDRESS }" }

Dear { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 }," "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD  
LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 }," }

**Re:** { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "Your Will"  
"Your Wills" }

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" " I am pleased to confirm  
that I have now finalised your draft Will and a copy is enclosed herewith for your perusal.  
" " I am pleased to confirm that I have now finalised your draft Wills and copies are enclosed  
herewith for your perusal." }

If there are any terms which you do not understand you should contact me immediately to  
discuss them further.

If you do wish to make any amendments I should be grateful if you would please confirm  
your proposed amendments by return.

If, however, you approve the draft Will please kindly telephone my secretary to arrange an  
appointment to sign your Will.

Whilst writing, I also enclose my invoice for your kind attention. I should be grateful if you  
would please discharge this as soon as possible.

I look forward to hearing from you.

Yours sincerely,

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\8b5a7548-7a61-483f-8d60-  
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{ MERGEFIELD "CALCULATION_FEE_EARNER_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME\*Upper }
```

# **Client File Closing Letter**

{INCLUDETEXT

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App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\35a45ff6-1a38-422c-92f7-  
50026399db06\\header.doc"

Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
client\_no }/{ MERGEFIELD matter\_no }

{ SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
MMMM yyyy" \ \\* MERGEFORMAT }

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 },  
{ MERGEFIELD CALCULATION\_ADDRESS }  
" "{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } {  
MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 },  
{ MERGEFIELD CALCULATION\_ADDRESS }" }

Dear { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{  
MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 }," "{  
MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & {  
MERGEFIELD LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 }," }

**Re: { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "Your  
Will" "Your Wills" }**

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" " I am pleased to  
confirm that this matter has now concluded, since you have approved and signed your Will.  
I will now take steps to close and archive your file.

I would recommend that you review your Will a minimum of every three years to ensure it  
still meets your requirements.

" "I am pleased to confirm that this matter has now concluded, since you have approved and  
signed your Wills. I will now take steps to close and archive your file.

I would recommend that you review your Wills a minimum of every three years to ensure it  
still meets your requirements." }

I can confirm that I do not have any original documents to return to you.

Your file will be stored in a secure place of storage for a period of 99 years. After this time,  
the file will be destroyed. If you wish to retrieve your file during this period please let me  
know and I will be happy to arrange this.

I will also keep your original Will in a secure place of storage. I would advise you to notify  
your executors that your Will is stored with this Firm.

May I take this opportunity to thank you for your kind instructions in this matter. If I can be of  
any assistance to you in the future please do not hesitate to contact me.

Yours sincerely,

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\35a45ff6-1a38-422c-92f7-  
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{ MERGEFIELD "CALCULATION_FEE_EARNER_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME\*Upper }
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# **Client Blank Letter**

{INCLUDETEXT

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App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\950bab61-acca-4643-8395-  
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Our Ref:        { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD  
                 client\_no }/{ MERGEFIELD matter\_no }

                 { SET LETTER{ DATE \@ "d MMMM yyyy" } }{ref LETTER \@ "d  
   MMMM yyyy" \ \ \* MERGEFORMAT }

{ IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } { MERGEFIELD  
LINKNAME\_SURNAME\_1 },  
{ MERGEFIELD CALCULATION\_ADDRESS }  
" "{ MERGEFIELD LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_INITIALS\_1 } {  
MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD LINKNAME\_TITLE\_2 } {  
MERGEFIELD LINKNAME\_INITIALS\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 },  
{ MERGEFIELD CALCULATION\_ADDRESS }" }

Dear { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 }," "{ MERGEFIELD  
LINKNAME\_TITLE\_1 } { MERGEFIELD LINKNAME\_SURNAME\_1 } & { MERGEFIELD  
LINKNAME\_TITLE\_2 } { MERGEFIELD LINKNAME\_SURNAME\_2 }," }

**Re:** { IF { MERGEFIELD FW\_WIL\_CAPACITY\_FW\_WIL\_SING } = "Single" "Your Will"  
                 "Your Wills" }

Yours sincerely,

{ MERGEFIELD "CALCULATION\_FEE\_EARNER\_DESCRIPTION" }  
{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME\*Upper }

{INCLUDETEXT

"C:\\Users\\neilb\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisor  
App\_expxx2x1s6rv4\\LocalState\\OspreyDocuments\\950bab61-acca-4643-8395-  
b728024f691b\\footer.doc"}

# **Client Initial Questionnaire**

## **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.

<b><u>Client's Details</u></b>	
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?	

<b><u>Current Wills</u></b>	
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

<b><u>Personal Circumstances</u></b>	
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.	

<b><u>Worldwide Wills</u></b>	
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?	

<b><u>Funeral Wishes</u></b>	
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?

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

<b><u>Executors</u></b>	
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?	
<b><u>Agricultural Property</u></b>	
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?	

<b><u>Right to Occupy</u></b>	
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

<b><u>Business Assets</u></b>	
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?	

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

<b><u>Pension Death Benefits</u></b>
--------------------------------------

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

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

<b>Gifts Made to Others</b>	
<p>Have you made any significant gifts to anyone (over £3,000.00 per year), within the last seven years?</p> <p>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?

{ MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD client\_no }/{ MERGEFIELD matter\_no }

# **Client Replies to Web**

# **Quesitonnaire**

## **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.

<b><u>Client's Details</u></b>	
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 }

<b><u>Current Wills</u></b>	
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 }

<b><u>Personal Circumstances</u></b>	
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 }



<b><u>Worldwide Wills</u></b>	
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 }

<b><u>Funeral Wishes</u></b>	
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 }

<b><u>Funeral or Care Plans</u></b>	
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 }

<b><u>Executors</u></b>	
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 }

<b>Children</b>	
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 }

<b>Personal Possessions</b>	
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 }

<b>Pets</b>	
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 }

<b>Cash Gifts</b>	
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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<b><u>Charity Gifts</u></b>	
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 }

<b><u>Buildings and Land</u></b>	
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.	
<b><u>Your Home</u></b>	
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_HMJODETS }
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 }
<b><u>Other Properties</u></b>	
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_OPJODETS }
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 }
<b><u>Foreign Property</u></b>	
Do you own a foreign property?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_FORPROWN }  Name of the joint owner: { MERGEFIELD FW_WIL_BUILAN_FW_WIL_FPJODETS }
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	
<b><u>Agricultural Property</u></b>	
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_AGRLOWN }
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_AGRIDAGE }
Who would you like the property to be left to?	{ MERGEFIELD FW_WIL_BUILAN_FW_WIL_AGRIRECI }

<b><u>Right to Occupy</u></b>	
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>

<b><u>Business Assets</u></b>	
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 }

<b><u>Life Assurance</u></b>	
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 }

**Shares and Investments**

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

{ MERGEFIELD FW\_WIL\_SHINVEST\_FW\_WIL\_SHAINV }

**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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#### **Any other Assets**

Please provide details of any other assets not previously mentioned.	{ MERGEFIELD FW_WIL_OTHRASS_FW_WIL_OTHRASS }
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#### **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?	{ MERGEFIELD FW_WIL_RESEST_FW_WIL_RESEST }
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#### **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.	{ 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 }

#### **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.	{ MERGEFIELD FW_WIL_PROASS_FW_WIL_PROASS }
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#### **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.	{ MERGEFIELD FW_WIL_CHILDREN_FW_WIL_OTHCHLD }
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#### **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?	{ MERGEFIELD FW_WIL_FAILGIFT_FW_WIL_FAILGIFT }
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**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 }