

# YOUR WILL CLIENT: QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of our firm, and your appointment if made, are set out below.

## PART A - You And Your Family

### 1. YOUR DETAILS

Forenames .....
Surname .....
Address .....
.....
.....Postcode .....
Telephone Number .....
Date of Birth .....
Occupation .....

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

.....
.....
.....
.....

### 3. YOUR HUSBAND/WIFE/PARTNER

Forenames .....
Surname .....
Date of Birth .....
Occupation .....

### 3. MARRIAGE/PARTNERSHIP DETAILS

- (a) Year of Marriage .....
- (b) Please tick this box if you are not married to your partner
- (d) Please tick this box if you are intending to marry/re-marry in the near future
- (e) Has either of you been married before?  
Yes      No

### 4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP) - full names, dates of birth, and address if different from yours

(a) Name .....
Date of Birth .....
Address .....
.....
.....
(b) Name .....
Date of Birth .....
Address .....
.....
.....
(c) Name .....
Date of Birth .....
Address .....
.....
.....
(d) Name .....

**5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER'S**

**PREVIOUS MARRIAGES OR RELATIONSHIPS** - full names, dates of birth, and address if different from yours

(a) Name ..... Date of Birth ..... Address ..... ..... ..... (b) Name ..... Date of Birth ..... Address ..... ..... ..... (c) Name ..... Date of Birth .....
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**Please note:**

- \* Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- \* Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

**PART B - YOUR HOME AND OTHER ASSETS**

**6. YOUR HOME** - is your home:

- (a) Owned:
- (i) in your name alone?      Yes    No
  - (ii) in joint names with your husband/wife/partner?    Yes    No
  - (iii) in the name of your husband/ wife/partner alone?      Yes    No
- (b) Rented?      Yes    No
- (c) Other - e.g. provided by a relative      Yes  
No

7. If your answer was (c) please give more details:

..... ..... ..... .....
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**8. DO YOU HAVE A BUSINESS?**      Yes    No

If yes: - state type of business

..... .....
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Is it a (tick box):

Company      Partnership    In Your Sole Name \_\_\_\_\_

**9. YOUR MAIN ASSETS**

Please list your other main assets below and give approximate values:-

..... ..... ..... .....
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**10. JOINT ASSETS**

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

..... ..... ..... .....
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**Please note:** Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will.

**11. DO YOU OWN ANY ASSETS ABROAD?**

If yes, please give details:-

..... ..... ..... .....
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**PART C - FUNERAL, EXECUTORS, GUARDIANS**

**12. FUNERAL.**

You may specify in your Will if you wish to be:

- Buried      Cremated      No preference

**Please note:**

- \* You should make these wishes known to your immediate family as well and not rely on what is in your Will.
- \* If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card.

**13. EXECUTORS**

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

List below up to four chosen executors.

(a) Name ..... Address ..... ..... ..... (b) Name ..... Address ..... ..... ..... (c) Name ..... Address ..... ..... ..... (d) Name ..... Address .....
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Would you like partners from our firm to act as your executor(s)?                      Yes    No

**14. GUARDIANS**

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

(a) Name ..... Address ..... ..... ..... (b) Name.: ..... Address .....
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**PART D - BENEFICIARIES**

The main part of your estate is called "the residue". (This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

**15. CASH GIFTS**

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

(a) Name ..... Address ..... ..... Amount £..... (b) Name ..... Address ..... ..... Amount £..... (c) Name ..... Address ..... ..... Amount £..... (d) Name ..... Address ..... ..... Amount £.....
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**16. GIFTS OF ARTICLES**

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will not be given the substituted item or the cash equivalent.

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

Address .....

.....

Article .....

(d) Name .....

Address .....

.....

Article .....

**18. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE**

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

(a) Name .....

Address .....

.....Share .....

(b) Name .....

Address .....

.....Share .....

**17. THE RESIDUE**

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 18.

- (a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally;
- (b) Everything to my children, names at question 4 above, equally and any other children of mine;

You may choose the age at which your children will receive their entitlement. Insert choice from 18, 21 or 25 years in this box:

- (c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named in the box below. If not in equal shares, then show the share each is to take.

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.....

Who is to benefit if the recipient dies before you?

(a) Name .....

Address .....

.....Share .....

(b) Name .....

Address .....

.....Share .....



**GENERAL NOTES**

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
2. On divorce, gifts to your husband/wife are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
3. If you are not making any provision for a husband/wife/partner, or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
4. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.



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