



YOUR WILL - CLIENT QUESTIONNAIRE

Please complete this questionnaire as fully as possible. If space is inadequate please attach extra sheets as appropriate. We will go through it with you, discuss your wishes after advice where necessary and then prepare your Will ready for you to sign.

PART A – YOU AND YOUR FAMILY

1. YOUR DETAILS

Full Name

Address

.....

..... Post Code

Tel. No.

Age 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:

.....

.....

2. YOUR HUSBAND/WIFE/PARTNER

First Name(s)

Surname

Age Occupation

3. MARRIAGE/PARTNERSHIP DETAILS

(i) Year of Marriage

(ii) Please tick this box if you are not married to your partner

(iii) Please tick this box if you are intending to marry/re-marry in the near future

(iv) Has either of you been married before?
Yes
No

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

(i) Name

Address

..... Age

(ii) Name

Address

..... Age

(iii) Name

Address

..... Age

5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER'S PREVIOUS MARRIAGE/RELATIONSHIPS – full names, dates of birth, and address if different from yours

(i) Name

Address

..... Age

(ii) Name

Address

..... Age

Please Note:

- Illegitimate and adopted children (but not Stepchildren) generally have the same rights of inheritance as other children.

- Children excluded from your Will will have a right to claim a share of your estate. Please ask for advice, if appropriate.

PART C
- FUNERAL, GUARDIANS, EXECUTORS

12. FUNERAL

Please tell us if you want to leave any specific funeral instructions in your Will

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

NB. 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. GUARDIANS

You may want to appoint one or two people to act as guardian(s) for your children. 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.

(i) Name

Address

.....

(ii) Name

Address

.....

14. EXECUTORS

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you can 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 a friend.

List below up to four chosen executors:

(i) Name

Address

.....

(ii) Name

Address

.....

(iii) Name

Address

.....

(iv) Name

Address

.....

Would you like partners from our firm to act as your executor(s)?

Yes
No

PART D
- BENEFICIARIES

The main part of your estate is called "the residue". (This is dealt with at question 16). 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.

- (i) Name
Address
.....
Amount £
- (ii) Name
Address
.....
Amount £
- (iii) Name
Address
.....
Amount £
- (iv) Name
Address
.....
Amount £
- (v) Name
Address
.....
Amount £

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.

- (i) Name
Address
.....
Article
- (ii) Name
Address
.....
Article
- (iii) Name
Address
.....
Article
- (iv) Name
Address
.....
Article
- (v) Name
Address
.....
Article

17. THE RESIDUE

This is everything that is left after payment of debts and funeral expenses and the gifts made in questions 14 and 15. Please state below who is to receive the residue on your death and who is to receive it if they die before you.

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 17.

(i) Everything to my husband/wife/partner named at question 2, outright, but if he/she has died then to my children, named at question 4, equally;

(ii) Everything to my children, named at question 4, 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;

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

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

18. IF NONE OF THE ABOVE CHOICES ARE APPROPRIATE

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

(i) Name
Address
.....
Share

(ii) Name
Address
.....
Share

Who is to benefit if the recipient dies before you?

(iii) Name

Address

.....

Share

(iv) Name

Address

.....

Share

GENERAL NOTES

If you are not making any provision for a husband/wife it is possible that he/she could still make a claim against your estate. If this does apply please seek further advice from us.

Signed

Dated