



## WILL QUESTIONNAIRE

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### **STRICTLY PRIVATE AND CONFIDENTIAL**

This questionnaire is designed to ensure that your Will and any tax advice we may give is relevant, accurate and fully tailored to suit your needs and circumstances.

The questionnaire is intended for use in a number of wide ranging circumstances. Some questions may not be appropriate to your particular circumstances, but please complete all relevant sections. The more information you provide now the easier it will be for us to complete matters on your behalf.

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# SECTION A – PERSONAL DETAILS

## PART A. Personal Details

1. Full Name: (Please also list any other names you are known by)

2. Home Address: (We will write to you at this address unless you specify a different address for correspondence)

3. Land Line:

Mobile:

4. Email address:

5. Date of Birth:

Occupation:

6. Marital Status:

Single

Engaged

Widowed

Married

Separated

Contemplating Marriage

Divorced

Re-married

7. Were you married in the United Kingdom?

Yes  No

8. Have you made any previous Wills? (If so, please provide a copy).

Yes  No

9. Are you domiciled in England/Wales?

Yes  No

If no, where are you domiciled?

10. Do you own any foreign assets?

Yes  No

11. Do you have a foreign Will?

Yes  No

If not you may need to make another Will in another jurisdiction

**PART B. Your Partner's Personal Details**

1. Their Full Name: (Please also list any other names they are known by)

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2. Date of Birth:  Occupation:

3. Do they have an existing Will?

Yes  No

**PART C. Details of any Children/Grandchildren/Dependents**

	Child's Full Name (or other dependent)	Age/Date of Birth	No of their children (Your Grandchildren)	Please advise if Adopted/Stepchild/Illegitimate
1				
2				
3				
4				
5				
6				
7				

**PART D. Details of Beneficiaries**

	Name(s)	Address	Relationship
1			
2			
3			
4			
5			

## SECTION B – FINANCIAL DETAILS

**PART E. Particulars of your assets** (please specify who the property is owned by, and whether it is held in sole or joint names)

Details of your Estate	Brief Details (such as address of property, name of bank, estimated asset value etc)	Value of your interest	Value of partner's interest	Tick if jointly held
Main residence, any outstanding mortgage secured on it				
Other properties (including foreign properties)				
Business Property				
Bank/Building Society Accounts				
Property in trusts of which you are a beneficiary and in trusts in which you have general power of attorney				
Life Policies				
Lifetime gifts, to whom and when made				
Pensions – self employed, personal or occupational. Brief details of arrangements for nominating death benefits (e.g. Letter of Wishes)				

# SECTION C – YOUR WILL

## PART F. Executors and Trustees

Executors and trustees are persons chosen by you who are responsible for administering your estate after your death. You must choose at least one executor and trustee, and can have a maximum of four. We usually recommend that you choose three executors and trustees, one of whom should be an independent professional (e.g. accountant, lawyer, etc).

Would you like a professional trustee from I Will Solicitors to act as your independent executor(s)?

Yes  No

List below the names and addresses of those whom you wish to appoint.

Full Name	Full Address	Relationship

## PART G. Guardians

You may want to appoint one or two people to act as guardians for any of your children who are under the age of 18. The appointment will usually only apply if both the child's parents have passed away whilst the child is under the age of eighteen.

Name	Address	Relationship

## PART H. Please indicate if any of the following apply:

You pay maintenance to a former spouse or children from a previous relationship

Yes  No

You pay maintenance to a former spouse or children from a previous relationship

Yes  No

You may receive a sizeable inheritance within the next few years (say 5 years)

Yes  No

You have made gifts exceeding £3,000 in the last 7 years

Yes  No

If you have answered yes to any of the above questions please provide further details in **Part J**.

**PART I. Your wishes**

	Your wishes	Your partner's wishes
<p>This section is very important.</p> <p>Please confirm who you would like to benefit from your estate and in what shares.</p> <p>Please provide the full names and addresses of the beneficiaries.</p> <p>Please also confirm who you would wish to benefit if your main beneficiaries die before you.</p>		

**PART J. Miscellaneous**

Please provide details of any matters not covered by the above sections which you consider may be relevant. Please continue on a separate page if necessary, and attach it to the end of this questionnaire.

**PART K. Notes**

1. A Will is usually automatically revoked 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 former spouse are cancelled as is their appointment as executor. However, the rest of the Will stands. This can often create problems and it is better to make a new Will.
3. If you do not make "reasonable" provision for a partner, a former partner or any other person who is financially dependent upon you, it is possible that they could make a claim against your estate. If this does apply please seek further advice from us.
4. Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.

As stated in note 3 above, children excluded from benefiting under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice if appropriate.

5. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.
6. If you are unsure of your domicile or own foreign assets then it is vital you make mention of this in the questionnaire.

**PART L. Client/Introducer Declaration**

**Clients Declaration**

I confirm that the details provided in this form are correct to the best of my understanding knowledge and belief.

Signed: \_\_\_\_\_ Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signed: \_\_\_\_\_ Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Third Party/Introducer Declaration**

I confirm that I have met with the above named clients (and I have verified their identity(s)) and they have confirmed their instructions to me as indicated on this form or any attachment to it.

Signed: \_\_\_\_\_ Print Name: \_\_\_\_\_ Date: \_\_\_\_\_