iWill Solicitors

WILL
QUESTIONNAIRE

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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OFFICE USE ONLY

DATE OF MEETING: | PLACE OF MEETING:

ADVISOR: | PERSONS PRESENT:

CAPACITY ISSUES?: | CLIENTS SEEN INDIVIDUALLY?: ○ Yes ○ No

EXISTING CLIENT: | INTRODUCED BY:

MISCELLANEOUS (Will type, Fees, Proceeding (Yes/TBC)):

SECTION A – PERSONAL DETAILS

PART A. Personal Details

Your Details

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

Your Partner's Details

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

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

3. Telephone:

4. Email address:

5. Date of Birth:

6. Occupation:

Telephone:

Email address:

Date of Birth:

Occupation:

7. Marital Status:

○ Single ○ Engaged ○ Widowed ○ Married

○ Separated ○ Contemplating Marriage ○ Divorced ○ Re-married

8. Were you married in the United Kingdom?

○ Yes ○ No

9. Have you (or your Partner) made any previous Wills?

○ Yes ○ No
*(If **yes**, please provide a copy or provide a summary of the details/changes below, please continue in Part H if you require more space)*

10. Are you (and your Partner) domiciled in England & Wales?

Yes No
*(If **no**, where are you domiciled?)*

11. Have you (or your Partner) been married before. If so, please add further details below:

TNRB Y/N

12. Do you (or your Partner) own any foreign assets?

Yes No
*(If **no**, you may need to make another Will in the foreign jurisdiction(s))*

13. Do you (or your Partner) have a foreign Will?

Yes No
*(If **no**, you may need to make another Will in another jurisdiction if you own foreign assets)*
*(If **yes,** please provide a copy)*

14. Have you (or your Partner) granted a Power of Attorney to anyone?

Yes No
*(If **yes,** please confirm the details below)*

15. Do you (or your Partner) have any physical disabilities or illnesses?

Yes No
*(If **yes,** please briefly describe the disability or illness below)*

16. Do you (or your Partner) have any mental health issues?

Yes No
*(If **yes,** please briefly describe the disability or illness below)*

17. Please indicate if any of the following apply:

You (or your Partner) pay maintenance to a former spouse or children from a previous relationship?

Yes No

You (or your Partner) may receive a sizeable inheritance within the next few years (say 5 years)?

Yes No

You (or your Partner) have made gifts exceeding £3,000 in the last 7 years?

Yes No

18. Are you (and your Partner) fluent in English?

Yes No
*(If **yes,** please go to question 20)*

19. Please confirm the language(s) you (and/or your Partner) are fluent in:

You:

Your Partner:

20. Are there health (or other) reasons for the preparation of the Will to be expedited?:

Date required by:

PART B. Details of any Children/Grandchildren/Dependants

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

PART C. Details of Beneficiaries

	Full Name	Full Address	Relationship to You
1			
2			
3			
4			
5			

PART D. Asset Details *(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 (please confirm 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 (include to whom and when made)				☐
Pensions (self employed, personal or occupational. Brief details of arrangements for nominating death benefits (e.g. Letter of Wishes))				☐
Miscellaneous (eg. Digital Assets (Paypal etc))				☐

PART E. 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

Please provide the details of the people you wish to appoint in the boxes below.

Full Name	Full Address	Relationship to You

PART F. Guardian(s)

You may want to appoint one or two people to act as guardian(s) 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 18. Please provide the guardian(s) details in the boxes below.

Full Name	Full Address	Relationship to You

PART G. Your wishes

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

PART H. 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 I. 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 J. 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:_____

OUR OTHER SERVICES INCLUDE:

Probate | Trusts & IHT Planning | Court of Protection work | Powers of Attorney | Charity Registration

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Professional. Trusted. Efficient.

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