



ISLAMIC WILL QUESTIONNAIRE

"It is the duty of every Muslim who has anything to bequeath not to let two nights pass without writing a Will about it." – Sahih al-Bukhari

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. You should complete this form using a PDF viewer and not in your browser as it will not save.

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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/No/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 Spouse'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:

Telephone:

4. Email address:

Email address:

5. Date of Birth:

Date of Birth:

6. Occupation:

Occupation:

7. Marital Status:

Single Contemplating Marriage Engaged Married

Re-married Widowed Separated Divorced

8. If you selected 'Married' or 'Re-married' for question 7 above, please confirm whether the marriage is:

Nikah only; or Nikah & Registry

9. Were you married in the United Kingdom?

Yes No

10. Have you (or your Spouse) 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 I if you require more space)

11. Are you (and your Spouse) domiciled in England & Wales?

Yes No

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

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

TNRB Y/N

13. Do you (or your Spouse) own any foreign assets?

Yes No

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

14. Do you (or your Spouse) 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)*

15. Have you (or your Spouse) granted a Power of Attorney to anyone?

Yes No

*(If **yes**, please confirm the details below)*

16. Do you (or your Spouse) have any physical disabilities or illnesses?

Yes No

*(If **yes**, please briefly describe the disability or illness below)*

17. Do you (or your Spouse) have any mental health issues?

Yes No

*(If **yes**, please briefly describe the disability or illness below)*

18. Please indicate if any of the following apply:

You (or your Spouse) pay maintenance to a former spouse or children from a previous marriage.

Yes No

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

Yes No

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

Yes No

19. Are you (and your Spouse) fluent in English?

Yes No

*(If **yes**, please go to question 21)*

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

You:

Your Spouse:

21. 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 Parents/Grandparents

	Name(s)	Address	Are they still living?
1	Your Father		
2	Your Mother		
3	Your Spouse's Father		
4	Your Spouse's Mother		
5	Grandparents	If your parents have predeceased you, your grandparents may be entitled to benefit from your estate under Islamic Law. For present purposes, please confirm if your (&/or your Spouse's) grandparents are alive, more information is requested in Part G.	

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 Spouse'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. Extended Family

Sometimes, extended family such as grandparents and siblings have an entitlement to your estate under Islamic law.

Please advise which of your (and your Spouse’s) grandparents are still living.

Please complete the boxes below, by writing the number of relations you have in each case. (Your Spouse's details should be placed in the second box.)

Full Brothers	<input type="text"/>	<input type="text"/>	Full Sisters	<input type="text"/>	<input type="text"/>
Half Brothers from Father	<input type="text"/>	<input type="text"/>	Half Sisters from Father	<input type="text"/>	<input type="text"/>
Half Brothers from Mother	<input type="text"/>	<input type="text"/>	Half Sisters from Mother	<input type="text"/>	<input type="text"/>

PART H . Your Wishes

Jurisprudence School

No Preference	<input type="checkbox"/> You	<input type="checkbox"/> Your Spouse	Hanafi	<input type="checkbox"/> You	<input type="checkbox"/> Your Spouse
Maliki	<input type="checkbox"/> You	<input type="checkbox"/> Your Spouse	Shafi'i	<input type="checkbox"/> You	<input type="checkbox"/> Your Spouse
Hanbali	<input type="checkbox"/> You	<input type="checkbox"/> Your Spouse			

Islamic Distribution & Wishes

If you wish to have a Shariah compliant Will, please simply write "Shariah compliant" in the space provided. You should be aware that in most scenarios, the wife's entitlement under Shariah is 1/8th of the husband's estate and the husband's entitlement is 1/4th of the wife's estate. Parents are also entitled to a share which is usually 1/6th of the estate. Children will usually have a right to inherit.

You may also leave up to one-third of your estate to beneficiaries not automatically entitled under Shariah. Please also confirm whether you wish to leave any monies to charities or to beneficiaries who in most cases receive no automatic entitlement under Shariah, (ie friends, brothers and sisters).

If you have any missed obligatory prayers, fasts, Zakat or Hajj, you may want to leave an amount to charity to compensate for the same. We suggest you consult with a scholar to ascertain the amount you should leave (if any).

Your wishes	Your Spouse's wishes

Waqf

Waqf is the Islamic concept of creating a fund from part of your estate which is maintained and grown indefinitely. Whatever the Waqf consists of will not generally be sold or inherited if you pass away but will be maintained as a separate fund. You will not be required to pay Zakat on anything you place into Waqf. You and your family (and whoever else you choose) will be able to continue to benefit from the Waqf assets, providing these are not being depleted (for example, you can continue to receive the rent from a property, but you should not sell the property and spend the money). As the Waqf is not meant to be depleted it can grow into the future and in time act as a form of continuing charity for you and your family. For more information on Waqf visit www.iwaqf.net

Would you like to consider making part of your estate into a Waqf?

You - Yes No Your Spouse - Yes No

PART I. 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 J. 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 spouse, a former spouse 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, under English law but not under Shariah Law.
5. 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.
6. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

PART K. 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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