



Your Will – Client Questionnaire

Please complete the following Questionnaire and then return it to us. We will then contact you to arrange a suitable time to discuss your needs either over the telephone or in person at our offices. Some of the questions will lead on to further enquiries, so we cannot guarantee to produce a draft based only on your written responses.

If there is not enough space for the details in the boxes provided then please use the continuation sheet at the end of the Questionnaire.

Part A – You And Your Family

1. Your Details

Forename(s).....
Surname.....
Address.....
.....Post Code.....
Telephone Number.....Mobile Number.....
E-mail.....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:-

.....
.....

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2. Your Husband/Wife/Civil Partner/Partner

Forename(s)
Surname.....Date of Birth.....
Occupation.....

3. Marriage/Partnership Details

- (a) Are you married to or in a civil partnership with your partner? YES/NO
- (b) Year of marriage/registered civil partnership
- (c) Are you intending to divorce/marry/disclose your partnership/enter a civil partnership or re-marry in the near future? YES/NO
- (d) Has either of you been married or in a civil partnership 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.....
.....

5. Children of your husband/wife/civil partner/partner’s previous marriage 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.....
Address.....	
.....	

Please note:

- In the absence of a Will, illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as legitimate 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 spouse/civil partner/partner | YES/NO |
| (iii) in the name of your spouse/civil partner/partner alone? | YES/NO |
- (b) If the property is held jointly how is it held:-
- Joint Tenants (where neither owns a specific share and there is automatic inheritance) YES/NO
- If 'yes, please provide details of your respective shares and copies of any documents recording this arrangement.*
- Tenants in Common (where you each own a specific share that is not automatically inherited by the other but which becomes part of your Estate) YES/NO
- (c) Rented? YES/NO

(d) Other – e.g. provided by a relative

YES/NO

7. If your answer was (c) or (d) please give details (i.e. who is the Landlord, rent paid and length of the tenancy):-

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

8. Do you have a business?

YES/NO

If yes – state type of Business

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Is it a:-

Company

YES/NO

Partnership

YES/NO

In your sole name

YES/NO

We will need to discuss the effect of your Will on business assets in more detail before we begin drafting.

9. Your Main Assets

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

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

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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 names(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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.....
.....

If yes:-

Have you made a Foreign Will

YES/NO

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/civil partner/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.....

Would you like partners from our firm to act as your Executors 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. You should discuss this with us. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name.....
Address.....
(b) Name.....
Address.....

PART D – Beneficiaries

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.

Name.....	Address.....	Amount.....
Name.....	Address.....	Amount.....
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.

Name.....	Address.....	Article.....
Name.....	Address.....	Article.....
Name.....	Address.....	Article.....

17. The residue

This is all that you own except jointly owned property after making the gifts in sections 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if those individuals before you. If there are gifts to your 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 parents share.

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

- (a) Everything to my husband, wife, civil partner or 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 named 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 chose from 18, 21 or 25 years in this box;

- (c) To my husband/wife/civil partner/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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.....
.....
.....

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?

Name.....	Address.....
.....	Share.....
Name.....	Address.....
.....	Share.....
Name.....	Address.....
.....	Share.....

Who is to benefit if the recipient dies before you?

Name.....	Address.....
.....	Share.....
Name.....	Address.....
.....	Share.....
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/civil partner are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create major problems and it is recommended that you consider making a new Will.
3. If you appoint your husband/wife/civil partner as a guardian that appointment will be cancelled on divorce. If you want such an appointment to continue despite divorce you must let us know.

