

Will Questionnaire

Please complete this questionnaire as fully as possible.

PART A - YOU AND YOUR FAMILY

1. YOUR DETAILS

Forenames _____

Surname _____

Address _____

_____ Postcode _____

Telephone
Number _____

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.

2. YOUR HUSBAND/WIFE/PARTNER

Forenames _____

Surname _____

Date
of Birth _____

Occupation _____

3. MARRIAGE/PARTNERSHIP DETAILS

- a) Are you married to your partner ? _____
- b) Year of Marriage _____
- c) Are in intending to marry/re-marry in the near future _____
- d) Have either of you been married before ? _____

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/PARTNER'S PREVIOUS MARRIAGE OF 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:

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other 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. Is your home:

a) Owned:

(i) in your name alone ?

(ii) in joint names with your husband/wife/partner ?

(iii) in the name of your husband/wife/partner alone ?

b) Rented ?

c) Other - e.g. provided by a relative ?

7. If you answer was c) please give more details

8. DO YOU HAVE A BUSINESS ? _____

If yes, state type of business

Is it a:

Company _____ Partnership _____ In Your Sole Name _____

9. YOUR MAIN ASSETS

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

10. JOINT ASSETS

Do you have any jointly owned assets ? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

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 :-

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 know 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. You may wish your husband/wife/partner to be your only executor but you should also 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 and whether you wish them to act only if a previously chosen executor has died:-

a) Name _____

Address _____

b) Name _____

Address _____

c) Name _____

Address _____

d) Name _____

Address _____

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. 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.

a) Name _____

Address _____

b) Name _____

Address _____

PART D - BENEFICIARIES

The main part of your estate is called "the residue" (This is dealt with at question 17). Before giving away the residue you may wish to make certain gifts or 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.

a) Name _____

Address _____

b) Name _____

Address _____

c) Name _____

Address _____

d) Name _____

Address _____

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.

a) Name _____

Address _____

b) Name _____

Address _____

c) Name _____

Address _____

d) Name _____

Address _____

17. THE RESIDUE

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die 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 parent's share.

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

- a) Everything to my husband/wife/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 your choice in this space (e.g. 18, 21 or 25) _____

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

a) Name _____

Address _____

Share _____

b) Name _____

Address _____

Share _____

Who is to benefit if the recipient dies before you?

a) Name _____

Address _____

Share _____

b) Name _____

Address _____

Share _____

19. FURTHER PROVISIONS

In the event of a tragedy and all of the proposed beneficiaries chosen in your Will, die before or at the same time as you, what provisions would you like for the residue of your estate.

GENERAL NOTES

1. A Will is usual 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 are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
3. If you are not making any provision for a husband/wife/partner or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
4. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

Complete the following schedules to help your solicitor assess the inheritance tax position:

| ASSETS | APPROXIMATE VALUE | | |
|---|-------------------|----------------------|-------|
| | SELF | SPOUSE/CIVIL PARTNER | JOINT |
| House (Mortgage paid on death?) | | | |
| Contents | | | |
| Car | | | |
| Jewellery → Substitutes if sold/not in estate on death | | | |
| Cash at bank | | | |
| Cash at Building Society | | | |
| Quoted stocks & shares → Company Name & No. of shares | | | |
| Partnership share or value of a sole business | | | |
| PEPs & ISAs | | | |
| Unlisted stocks & shares (i.e. in a private company) | | | |
| Other assets, including non-UK (please specify) | | | |
| Premium bonds/Other Bonds –Numbers & dates of acquisition | | | |
| LIFE ASSURANCE POLICIES | | | |

| | | | |
|--|--|--|--|
| Life insurance company | | | |
| Policy Number | | | |
| Sum assured | | | |
| Premiums | | | |
| Purpose of Policy | | | |
| Whether or not in Trust | | | |
| PENSION DEATH BENEFITS | | | |
| Pension scheme or policy | | | |
| Amount of death benefit | | | |
| Widow's or widower's pension | | | |
| Is death benefit in trust? | | | |
| Nomination form completed | | | |
| LIABILITIES | | | |
| Mortgage | | | |
| Other, e.g. personal loans Car loans | | | |

What to consider when making a Will

Executors

Executors are the people you appoint in your Will to ensure that your wishes are carried out. One executor would be enough in most cases, but it is usual to appoint two or three. The maximum number of executors who can act at any one time is four. You may choose trusted relatives or friends or professional people such as the directors of PM Limited. Your executors can also be beneficiaries but do not have to be.

Beneficiaries

Beneficiaries are the people you want to benefit from your Will. You can make specific gifts of items such as jewellery, or legacies of specified amounts of money, or you might want to give a proportion of what is left after debts and any legacies of specified amounts have been paid.

If you want to benefit persons under the age of 18 then their inheritance will have to be held in trust for them until they reach that age. The persons who hold that inheritance in trust are called trustees. The trustees can be the same people as the executors but do not have to be.

If you are a parent and want to benefit children who are under 18 now, you may decide that they should wait until they are older until they receive their inheritance. Many parents think it is better for their children to inherit at age 21 or even age 25. You can state in your Will when your children should inherit.

Guardians

If you have children under 18 you will need to state who should be their guardians. It is usual for trusted relatives such as aunts and uncles to be appointed as guardians and they do not have to be the same people as the executors or trustees.

Marriage and Civil Partnership

If you are unmarried but may marry in the future you need to be aware that marriage will revoke your Will. However, if you are planning to be married you may state that your Will is made in contemplation of marriage to a named person. By stating the Will is made in contemplation of marriage it will not be revoked when the marriage takes place. The same applies if you are contemplating entering into a civil partnership.

Burial or cremation

You may state in your Will whether your body should be buried or cremated and give any other directions relating to funeral arrangements. You may also specify if you wish to donate organs for medical or research purposes.

Inheritance Tax

Your executors will have to pay Inheritance Tax at 40% on that part of your estate which is over the £325,000 threshold. For married couples and those in civil partnerships any part of the tax threshold which is unused on the first death can be carried over to be used on the second death. This does not apply to couples who are not married or in a civil partnership. These couples may wish to consider setting up a discretionary trust. Please ask for more details. We make an additional charge for including a discretionary trust.