

# WILL QUESTIONNAIRE

This is our standard Will Questionnaire.  
 It's long because it has to cover everybody.  
 You don't need to fill in all the sections though - just the ones that apply to your circumstances.

## Section 1: Your details

|  | Client 1  | Client 2  |
|--|---|---|
| Your title:  |   |   |
| Your full name<br>(include middle names):  |   |   |
| Have you ever used any other names?<br><br>(Maybe you changed your name when you were married? Please give details.) |   |   |
| Address:   |   |   |
| Daytime Telephone Number:  |   |   |
| Mobile Number:   |   |   |
| Email Address:   |   |   |
| Occupation:<br><br>(If you have retired, write "retired", and give your previous occupation.)                        |   |   |
| Date of Birth:   |   |   |
| Marital Status (tick one)  | <input type="checkbox"/> Married<br><input type="checkbox"/> Civil Partner<br><input type="checkbox"/> Divorced or former Civil Partner<br><input type="checkbox"/> Single<br><input type="checkbox"/> Widowed<br><input type="checkbox"/> Cohabiting<br><input type="checkbox"/> Separated | <input type="checkbox"/> Married<br><input type="checkbox"/> Civil Partner<br><input type="checkbox"/> Divorced or former Civil Partner<br><input type="checkbox"/> Single<br><input type="checkbox"/> Widowed<br><input type="checkbox"/> Cohabiting<br><input type="checkbox"/> Separated |
| Are you normally permanently resident in the UK?   | <input type="checkbox"/> Yes <input type="checkbox"/> No  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |
| <i>If 'Yes', which country do you live in?</i>   | <input type="checkbox"/> England<br><input type="checkbox"/> Scotland<br><input type="checkbox"/> Wales<br><input type="checkbox"/> Northern Ireland  | <input type="checkbox"/> England<br><input type="checkbox"/> Scotland<br><input type="checkbox"/> Wales<br><input type="checkbox"/> Northern Ireland  |



## Section 2: Children

This includes step-children and adopted children. If you do not have any children, you can go to Section 4.

|   | Name | Address | Date of Birth | Child or Step Child |
|---|------|---------|---------------|---------------------|
| 1 |      |         |               |                     |
| 2 |      |         |               |                     |
| 3 |      |         |               |                     |
| 4 |      |         |               |                     |
| 5 |      |         |               |                     |
| 6 |      |         |               |                     |
| 7 |      |         |               |                     |
| 8 |      |         |               |                     |

If you have step-children or your husband / wife / partner has step-children please get in touch with us to discuss this further.

### Guardians

If you have children under the age of 18, you should appoint Guardians for them. Please provide the name and address of up to 2 people. Guardians don't necessarily have to be related to you.

|                      |  |
|----------------------|--|
| Full Name:           |  |
| Address:             |  |
| Relationship to you: |  |

|                      |  |
|----------------------|--|
| Full Name:           |  |
| Address:             |  |
| Relationship to you: |  |

Do you wish to include a Letter of Wishes about Guardians for the children?  
We will send you a note to help you to write this letter.

Yes

No

## Section 3: Property

If you don't own any property, you can go to Section 5.

### PROPERTY

When we say *property* in this section we mean houses, flats, land etc

Do you own a property? Yes  No

|   |                          |
|---|--------------------------|
| Land / Property address (and Title Number if you have it) | Details of any mortgages |
|---|--------------------------|

Is it owned solely (just by you) or jointly? Solely  Jointly

If jointly, as joint tenants or tenants in common? (see note below) Joint Tenants  Tenants in Common

If you have answered Joint Tenants, that means the property will automatically pass to the surviving joint owner when you die. If you do not want that to happen, you will need to sever the joint tenancy, so please get in touch with us to discuss this. Otherwise, you can go to section 5.

|   |  |
|---|--|
| If Tenants in Common how many joint owners are there (including you)? It helps if you know the proportions in which they share the property, but don't worry if you don't have those details: |  |
|---|--|

If you don't know if a jointly owned asset is owned as joint tenants (also called "beneficial joint owners" or just "joint ownership") or jointly owned as "tenants in common", you can find out from the Land Registry.

You can get a copy of the title register for the property from the Land Registry website at [www.landregistry.gov.uk](http://www.landregistry.gov.uk). The names of all the joint owners will be given on the title register and if the property is held as tenants in common that should also be shown by something called a 'Form A restriction'. The Form A restriction looks something like this: "No disposition by a sole proprietor of the registered estate (except a trust corporation) under which capital money arises is to be registered unless authorised by an order of the court."

The Land Registry document will not say what proportion (share) of the property was owned by each owner. To find out the share owned by each owner you will need to look at the declaration of trust document or, if the property was inherited jointly from someone else under their will, the will under which it was inherited.

**Alternatively, we can do all this for you. Tick here if you would like us to.**

**GIFTS OF PROPERTY**

You can give property (for example a house) to someone just as a gift.

These are specific gifts of land or property.

Please provide the details below, with a description of the land/property to be given away:

|   | Land / Property address (and Title Number if you have it) | Name and Address of the person receiving the gift | Relationship of that person to you (if any) |
|---|---|---|---|
| 1 |   |   |   |
| 2 |   |   |   |
| 3 |   |   |   |
| 4 |   |   |   |
| 5 |   |   |   |
| 6 |   |   |   |

**GIVING SOMEONE THE RIGHT TO LIVE IN A PROPERTY**

You can leave a property to one person but allow another person to live in it. For example, you could give a house to your children but allow your husband, wife or partner to continue to live in it. You can decide if that person can live in the property for their whole life or if the right ends if they remarry.

If you would like to give someone the right to occupy, please provide details below:

Full name of occupant \_\_\_\_\_ Male  Female

Address of property: \_\_\_\_\_

If this person remarries after your death should the right to occupy end? Yes  No

There are many variations on this. For example, you might want to allow them to sell the house and buy something smaller without losing their right to occupy. If you want to make these sorts of provisions, you will need to talk to us about it.

## Section 4: Foreign Assets

If you don't own anything outside the UK, you can go to Section 6.

### FOREIGN ASSETS

If you have foreign property or possessions that you want included in your will, you will need legal advice so please get in touch with us. It would also help us if you could complete the rest of this document.

Do you own any foreign property (houses, buildings, land etc.)? If so please give details below

|   | Brief details: | Country: | Value: | To be covered in this will? |
|---|----------------|----------|--------|-----------------------------|
| 1 |                |          |        |                             |
| 2 |                |          |        |                             |

If you have any other assets abroad, please provide brief details and values, including the country where you hold those assets and whether you want your new will to cover them:

|   | Brief details: | Country: | Value: | To be covered in this will? |
|---|----------------|----------|--------|-----------------------------|
| 1 |                |          |        |                             |
| 2 |                |          |        |                             |
| 3 |                |          |        |                             |
| 4 |                |          |        |                             |
| 5 |                |          |        |                             |

## Section 5: Executors

### WILL INFORMATION

Have you previously made a Will? Yes  No

If 'yes' where is it kept? \_\_\_\_\_

### EXECUTORS

Choose between one to four executors. If there are child beneficiaries, you must choose at least two executors.

Appointing the firm as Executor

Would you like this firm to act as Executor? Yes  No

OR

Appointing people you know as Executors

|   | Name | Address | Relationship to you (if any): |
|---|------|---------|-------------------------------|
| 1 |      |         |                               |
| 2 |      |         |                               |
| 3 |      |         |                               |
| 4 |      |         |                               |

Would you like this firm to act as Executor if these people can't (or don't want to) act? Yes  No

Note about fees: If this firm acts as executor, we will be entitled to charge additional fees to the estate for acting as executor and we will discuss these with you before we prepare the will.

If you want the firm to act as executor jointly with people you know, please get in touch and we can arrange that.

## Section 6: Gifts in the will (legacies)

In this section, we'll ask you to think about four ways you can make gifts in your will:-

### 1. Giving away specific things

A specific legacy means leaving something specific to someone, rather than just a cash sum payable out of the general estate. We'll ask you about cash legacies later in this section.

Describe what you mean in your own words and be careful to make sure everything is clear and unambiguous. If you have similar items make sure that you clearly identify both the gift and the person receiving it.

### 2. Choosing someone to distribute your items for you

You can choose someone to distribute items for you at their discretion, where you want people to be able to choose,; for example you could give all your jewellery to your daughter to distribute amongst the family.

### 3. Cash gifts

### 4. Gifts to a class

For example, you could give all of the grandchildren an amount of cash.

You can also specify a "substitute", which means if that person dies before you, the gift can go to somebody else.

### **SPECIFIC LEGACIES (gifts other than property and cash)**

|                                    |  |
|------------------------------------|--|
| Description of gift:               |  |
| Beneficiary Full Name and Address: |  |
| Relationship to you:               |  |

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'Yes' please provide details below:

Yes  No

|  |  |
|--|--|
| Alternative Beneficiary Full Name and Address: |  |
| Relationship to you:                           |  |

|                                    |  |
|------------------------------------|--|
| Description of gift:               |  |
| Beneficiary Full Name and Address: |  |
| Relationship to you:               |  |

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'Yes' please provide details below: Yes  No

|  |  |
|--|--|
| Alternative Beneficiary Full Name and Address: |  |
| Relationship to you:                           |  |

|                                    |  |
|------------------------------------|--|
| Description of gift:               |  |
| Beneficiary Full Name and Address: |  |
| Relationship to you:               |  |

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'Yes' please provide details below: Yes  No

|  |  |
|--|--|
| Alternative Beneficiary Full Name and Address: |  |
| Relationship to you:                           |  |

|                                    |  |
|------------------------------------|--|
| Description of gift:               |  |
| Beneficiary Full Name and Address: |  |
| Relationship to you:               |  |

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'Yes' please provide details below: Yes  No

|  |  |
|--|--|
| Alternative Beneficiary Full Name and Address: |  |
| Relationship to you:                           |  |

**1. CHOOSING SOMEONE TO DISTRIBUTE**

Would you like to choose someone to distribute items for you? Yes  No

You will have to provide a letter of wishes appointing that person. We will send an example letter of wishes to help you to write this.

**2. CASH GIFTS TO CHARITY**

Would you like to make any cash gifts to charity? Yes  No

If 'Yes' please provide details below:

|   | Amount £ | Charity | Address | Registered Charity No: |
|---|----------|---------|---------|------------------------|
| 1 |          |         |         |                        |
| 2 |          |         |         |                        |
| 3 |          |         |         |                        |
| 4 |          |         |         |                        |

The registered charity number is not essential but be careful to be specific if you do not have it because many charities have similar names.

You have to decide what you want to do about any Inheritance Tax. Charities don't pay Inheritance Tax, but your beneficiaries would have to, so you need to decide whether to pay charities their amount before or after tax:

Give the legacy to charities before tax (which means charities get more because they don't pay tax).

Give the legacy to charities after tax (which means charities get the same for their share as they would if they paid tax along with everyone else).

**CASH GIFTS TO PEOPLE YOU KNOW**

This is where we record specific gifts of cash in the will. Please provide details of the people to whom you are making cash gifts, and the cash sum amount that you would like to leave. This should include any gifts to your children, step-children etc.

You can also specify that the children receive their gifts when they reach a certain age. If you want to do anything more complex (for example pay everybody when the youngest child reaches 18), get in touch with us to discuss.

If you want the children to inherit immediately, just leave these boxes blank.

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 1. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 2. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 3. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 4. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 5. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 6. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 7. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

|                                    |  |                      |  |
|------------------------------------|--|----------------------|--|
| 8. Gift Value £:                   |  |                      |  |
| Beneficiary Full Name and Address: |  |                      |  |
| Relationship to you:               |  | Age to receive gift: |  |

You can also leave each or any Executor a cash gift provided they “prove your will” (get probate) – the gift is a way of thanking them for doing the work.

If you want to leave specific 'things' to your executors as mementoes, should you include them in Table 1 of this Section 7.

Do you want to leave a cash gift to any executor provided they prove your will?

No

Yes, give each Executor who proves my will the same amount of £ \_\_\_\_\_

Yes, give each Executor who proves my will the amounts I have set out below

If you want to give a different amount to each Executor or give an amount to one Executor but not the others, please tick the box above and then specify the cash amount below

|                    |   |
|--------------------|---|
| 1. Gift Value:     | £ |
| Executor Full Name |   |

|                    |   |
|--------------------|---|
| 2. Gift Value:     | £ |
| Executor Full Name |   |

|                    |   |
|--------------------|---|
| 3. Gift Value:     | £ |
| Executor Full Name |   |

|                    |   |
|--------------------|---|
| 4. Gift Value:     | £ |
| Executor Full Name |   |

**GIFTS TO A CLASS**

A class beneficiary is when you make a gift of the same amount of money to, for example, “the grandchildren”

The will would say something like “I leave £500 to each of my grandchildren living at the date of my death”

Please provide details of any gift of cash that you would like to leave to a class of beneficiary

|   | Class Type                     | Amount £<br>(please specify if this is per person or a total amount) | Age to receive gift |
|---|--------------------------------|--|---------------------|
| 1 | Children:                      |  |                     |
| 2 | Grandchildren:                 |  |                     |
| 3 | Siblings (brothers & sisters): |  |                     |
| 4 | Nieces and Nephews:            |  |                     |
| 5 | Nieces (only):                 |  |                     |
| 6 | Nephews (only):                |  |                     |
| 7 | Cousins:                       |  |                     |
| 8 | Other:                         |  |                     |

## Section 7: How the estate is distributed

What happens to the remainder of the estate after these legacies are distributed? We call that the “residue” of the estate. It is what’s left after the funeral expenses, debts, administration costs, taxes and legacies we have asked you about have all been dealt with.

We’re only asking you about the “residue” in this section. The residue means what is left over, but if you haven’t given us any specific instructions in the earlier sections, the “residue” could be everything you own.

Remember to think about the “what if’s”. For example what should happen if someone was due to receive something but then dies before you? Does it go to their children? Or back to the estate to be shared out?

If there is no one to inherit, the official rules are applied and these often give a result you would not want. At worst, your estate could go to the Crown (which means the State).

Please also specify the age at which each beneficiary should inherit – a child beneficiary is automatically entitled to inherit at the age of 18 unless you say otherwise. If the child is under-age their share will be held in trust until they reach the required age.

We now need to ask you a few questions about what you want to do with the residue. You need to answer all of the questions unless prompted to move on.

### Question 1

We have already asked you about specific gifts in the previous section. This section is about everything else in your estate, the “residue”.

Do you want to leave the residue first to your husband/wife/civil partner?

Yes – do that. Now answer question 2.

No – I do not want to leave the residue to my husband/wife/civil partner  
Now answer question 2.

### Question 2

If your husband/wife/civil partner dies before you, or you do not have a husband/wife/civil partner, or you divorced or separated, would you like to leave your estate to your children? You can specify the age you want your children to inherit, or leave it blank if you want them to inherit immediately.

a) I do not have any children. Now go to question 4.

b) Yes, I would like my children to inherit from my estate in equal shares (tick box)

c) I would like my children to inherit the residue from my estate in unequal shares, as below (tick box)

| Name | Address | Age to inherit (if applicable) | Share (% or fraction) |
|------|---------|--------------------------------|-----------------------|
|      |         |                                |                       |
|      |         |                                |                       |
|      |         |                                |                       |
|      |         |                                |                       |
|      |         |                                |                       |

d) I do not want my children/ I do not want my child to inherit the residue from my estate (tick box)

Name(s) of children who will not inherit residue:

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**If you have chosen c) or d) so that one child receives less than others, then you should write a letter to your Executors explaining why you have made this decision.** The Executors' job is to carry out your instructions and wishes. The reason they need a letter of explanation if a child looks like they are receiving very little in your Will is to help your Executors if the child claims they should be entitled to more.

e) What happens if you have told us to leave something to a child and that child dies leaving children of their own? Normally, their share would pass down to their children. Should we do that?

Yes  No

**Question 3**

Do you want to make provision in your Will for the possibility that everyone chosen to inherit from your estate (above) might die before you?

Yes  Please give details in question 4.

No  You have now completed the questions in this section. Please go to section 9.

**Question 4**

a) Do you want to leave the residue of your estate to particular people and/or charities?

Yes  Please give further details below. You can specify an age (say 18) at which People inherit, or leave those boxes blank if you want them to inherit immediately.

No

| Name | Address | Relationship to you (if applicable) | Age to inherit (if applicable) | Charity No (If applicable) | Share (%) |
|------|---------|-------------------------------------|--------------------------------|----------------------------|-----------|
|      |         |                                     |                                |                            |           |
|      |         |                                     |                                |                            |           |
|      |         |                                     |                                |                            |           |
|      |         |                                     |                                |                            |           |
|      |         |                                     |                                |                            |           |
|      |         |                                     |                                |                            |           |

b) If you have chosen a charity above and that charity ceases to exist before you die, do you want your Executors to choose a similar charity as a substitute?

Yes  No

c) If you have chosen a person above and that person dies before you, do you want their share to be added to the shares of the other people and/or charities?

Yes  No

## Section 8: Last few questions

### 1. FUNERAL WISHES

Would you like your executors to arrange a:      Burial  Cremation  No Preference

Would you like your body to be made available for medical purposes after your death?      Yes  No

Please see our note about Funeral arrangements which explains what a letter of wishes is and why you might want to include one.

Would you like to include a Letter of Wishes, to be placed with your preferences for funeral arrangements?      Yes  No

### 2. TRUSTEES POWERS

This applies only if there is a trust, otherwise you should ignore this question. If you have left anything to children under the age of 18, that automatically creates a trust under your will.

Trustees' powers are very limited by law and we strongly advise that you give them extra powers to help them to administer your Estate and any Trust. Please confirm that you are happy for such extra powers to be included.

Yes  No

If you answer 'No' please phone us to discuss this further.

### 3. OTHER INFORMATION – LIFETIME GIFTS

Some people make gifts of money to beneficiaries in their Will while you are alive and then choose to reduce the gifts in the will by the same amount. They are treating the gifts made during their lifetime as a sort of advance against the inheritance. Should we do that: take lifetime gifts into account and deduct them from the legacies that go to the beneficiaries after you die? Maybe you would want to do so if the gifts are over a certain amount or made within a certain period of your death?

Yes  No

If you answer 'Yes' please phone us to discuss the exact provisions that you require.

### 4. YOUR ESTATE

After taking into account any commitments such as mortgage, credit cards, forthcoming holidays etc., what do you think is the approximate value of your estate worldwide, that is including assets less liabilities abroad?

Value:      £ \_\_\_\_\_

Do you anticipate that your sole or joint estate will be more than £325,000?      Yes  No

If so, your estate could pay Inheritance Tax. Please get in touch with us to discuss.

**5. DO YOU OWN OR RUN YOUR OWN BUSINESS OR FARM?**

Do you own, have an interest in, or run a business or farm - either as a sole trader or with someone else? Yes  No

If so, your estate could pay Inheritance Tax.

If you answer 'Yes' please phone us to discuss the special provisions which relate to businesses and farms.

**6. SPECIAL CIRCUMSTANCES**

Are there any special family or personal circumstances we should think about? For example, a previous spouse and children or a disabled family member. If nothing is said in your Will about a significant family member or dependent, that person can make a claim against your estate. This includes your spouse, children and anyone being wholly or partly maintained (looked after) by you or who lived with you as husband or wife, although not married, for the two years before your death.

Yes  No

Also note that legacies may affect the Social Security Benefits of a beneficiary so please tell us if any of your beneficiaries receive Social Security benefits?

Yes  No

Have you told anyone that they will inherit from your estate when you die, but in fact, under the terms of your Will, they will not (either at all or to the extent promised)?

Yes  No

**7. LASTING POWER OF ATTORNEY**

If you become mentally or physically incapable of managing your affairs before you die, it's extremely useful to have a document called a Lasting Power of Attorney ready to appoint someone else automatically to be in charge of your affairs instead of you. This avoids an expensive and time consuming application to the Public Guardianship Office for the appointment of a Receiver. We would strongly advise that you make either a General or Lasting Power of Attorney. Please confirm whether you would like us to discuss these whilst dealing with your Will?

Yes  No

Form Completed by:

Date:

**THANK YOU FOR COMPLETING THIS FORM. WE LOOK FORWARD TO WORKING ON YOUR FILE.**