



YOUR WILL: CLIENT QUESTIONNAIRE

To help us prepare your Will please complete this questionnaire as fully as possible before the date of your appointment. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign.

PART A – You And Your Family

1. About You

Forename(s)	Surname
Address	Telephone Number
Line 1	Date of Birth
Line 2	Occupation
Postcode	

Do you or any member of your family have any other name to which you or they are known and do you own any assets in a different name?

If you answered yes to the above, please give full details below:

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

2. Details Of Your Marriage/Partnership

- i) Year of marriage
- ii) Are you married to your partner? Yes No
- iii) If not married are you likely to marry/re-marry in the foreseeable future? Yes No
- iv) Has either of you been married before? Yes No

3. About Your Spouse/Partner

Forename(s)	Surname
Occupation	Date of Birth

4. About Your Children (This includes any children you have from a previous marriage or relationship)
 Please complete the following paragraphs for each Child

a) Name	b) Name
Date of Birth	Date of Birth
Address	Address
.....
c) Name	d) Name
Date of Birth	Date of Birth
Address	Address
.....

5. Children of your spouse/partner's previous marriages or relationships

Please complete the following paragraphs for each Child

a) Name Date of Birth Address	b) Name Date of Birth Address
c) Name Date of Birth Address	d) Name Date of Birth Address

PART B – Your Home and Other Assets

6. Your Home - Is your home:

a) Owned:

- i) In your sole name? Yes No
- ii) In joint names with your Spouse/Partner? Yes No
- iii) In the name of your Spouse/Partner solely? Yes No

b) Rented? Yes No

c) Other? Yes No

If you answered yes to part c) Please provide further details below:

.....

7. Do You Have A Business? Yes No

If you answered yes, please state the type of business below

.....

Is your business a: Company Partnership

In your sole name (Please tick as appropriate)

9. Joint Assets – Do you have any jointly owned assets? If so, please provide a general description below and include their approximate values. Please also provide the name(s) of the other owner(s).

.....

N.B. Assets which are jointly owned typically pass to the joint owner automatically and cannot pass by Will

8. Your Main Assets – Please list any other main assets below and give an approximate value for each:

.....

10. Do you own any assets abroad? If so, please provide details below

.....

PART C – Funeral, Executors and Guardians

11. Funeral

You may specify in your Will whether you wish to be:- (Please tick as appropriate)

Buried Cremated No Preference

It is advisable to notify your immediate family of these wishes as well, rather than relying on the contents of your Will.

12. Guardians If you have children under the age of 18, you should carefully consider appointing a guardian to look after them if you and the Childs other parent have both died. Please note that being the guardian of another persons child carries with it a lot of responsibility and it is advisable to ask people to agree to act before appointing them.

Please insert the names of your chosen guardians below. You may appoint up to two individuals to act.

i) Name
Address
.....
ii) Name
Address

13. Executors - Executors must be appointed in order to carry out the instructions in your Will. It is advisable to appoint at least two and you may have your spouse or partner as one. Further, it is recommended to name other Executors 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.

Please list your chosen executors below. You may appoint up to four:

i) Name
Address
.....
ii) Name
Address
.....
iii) Name
Address
.....
iv) Name
Address.....

PART D – Beneficiaries

The main part of your estate is called “the residue” (see question 16.) Before giving away the residue you may wish to specify gifts to include in your Will. Gifts may include gifts of cash or personal or household items to certain named persons or charities. These persons or charities will be known as “beneficiaries”.

14. Cash Gifts – Please provide details of the beneficiary and the amount to be given, with the age of anyone who is under 18.

i) Name
Address
.....Amount.....
ii) Name
Address
.....Amount.....
iii) Name
Address

15. Gifts Of Articles - Please provide details of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. 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 cash equivalent.

i) Name
Address
.....
Article.....

ii) Name
Address.....
.....
Article

iii) Name
Address.....
.....
Article

16. The Residue

This includes all property you own excluding any jointly owned property and any gifts (made in questions 14 and 15)

Please give the names of the individuals who you wish to receive the residue on your death and also who is to receive it if they die before you.

N.B. If you wish to leave gifts to children, it is recommended that a provision be included that if any of them dies before you, leaving a child of his/her own, those children (your grandchildren) will inherit their parents share.

A list of common provisions are set out below. If you wish to use one of these please tick the appropriate box; if not, please go to question 17.

i) Everything to my spouse/partner named at question 3 above, absolutely, but if he/she predeceases me then to my children named at question 4 equally

ii) Everything to my children named at question 4, equally and any other children of mine.

You may choose the age at which your children will receive their entitlement. Please tick as appropriate

18 21 25

iii) To my spouse/partner named at question 3 above, but if he/she predeceases me to the person(s)/organisation(s) named in the box below. If you do not want to give in equal shares then please provide the share you would like each to take.

.....

17. If None Of The Above Choices Is Appropriate

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

i) Name
 Address

Share.....

ii) Name
 Address

 Share.....

iii) Name
 Address

 Share.....

Please give the names of the individuals you wish to benefit if the recipient predeceases you

i) Name
 Address

Share.....

ii) Name
 Address

 Share.....

iii) Name
 Address

 Share.....

General Notes:

- i) A Will is usually completely cancelled if you marry after making it. You need to make another Will immediately, or one which takes a forthcoming marriage into account.
- ii) On divorce, gifts to your spouse 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.
- iii) If you are not making any provision for a spouse/partner, or former spouse/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
- iv) Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment