

Will Questionnaire – Guidance notes on reverse

Please can you fill in this questionnaire to the best of your knowledge in preparation for your appointment about your Will.

This is only to assist us and to help making your Will a speedier process. We will be asking you more details during your appointment, but it is important that you think about all of these points before you attend the appointment.

It is important that you bring this information with you to your appointment to enable us to complete your Will more efficiently.

If we have not provided you with enough space or you wish to add more Executors, Beneficiaries etc please write them down on a separate sheet of paper and bring it with this form to your appointment

If you have any queries please do not hesitate to contact us on 01579 345304

Please bring this with you to your appointment

Do you have a previous Will? Yes/No
Where is it held?

Cash Gifts

Marital Status (including if you've been divorced)

Children? Yes/No If yes how many?
Are they under 18? Yes/No
Do you need to appoint a Guardian? Yes/No

(please provide how much you would like to leave, full names of beneficiary and full address)

Charitable Gifts?

Are you planning to get married in the near future?
Yes/No

Residuary Beneficiaries

Do you wish to be: Buried or Cremated

Beneficiary 1
Full Name

Executors

Executor 1 Full Name & Relationship To You

Beneficiary 1's Full Address

Executor 1's Full Address

How much? (percentages or shares)

Executor 2 Full Name & Relationship To You

Beneficiary 2
Full Name

Executor 2's Full Address

Beneficiary 2's Full Address

How much? (percentages or shares)

Specific Gifts

(please provide what you would like to give, full names of beneficiary and full address)

Please also consider what will happen to someone's share if they predecease you

Your Assets

Do you own your property? Yes/No

Is it in your sole name or joint with your partner? Sole/joint

Is your property held as joint tenants or tenants in common? Yes/No

What is the approximate value of your house?

Do you have a mortgage? Yes/No
If yes how much is outstanding

Do you own any other properties (including properties abroad)? Yes/No

Details including value:

Do you own a business or are you self-employed? Yes/No

Details including value:

Foreign Assets? Yes/No

Details including value:

Do you have any valuable contents?

Bank Accounts?

How much (approximately) is in your sole named bank accounts?

How much (approximately) is in joint bank accounts?

Shares?

Do you own any shares? Yes/No

Details including value?

Insurance Policies?

Do you have any life insurance policies? Yes/No

Value and who is it payable to?

Pensions/Death in Service Benefits?

Do you have an occupational pension(s)? Yes/No

Value and who is it payable to?

Do you have a Death in Service Benefit? Yes/No

Value and who is it payable to?

Guidance Notes

Executors:-

An Executor is the person or persons you appoint in your Will to wind up and distribute your estate. It makes sense to choose someone who is younger than you (although over 18 years of age) and in good health. Normally there are one or two Executors, but you can appoint up to four. Many people decide to appoint the Solicitor who prepares their Will as their Executor.

Specific Gifts: -

e.g. House or other property, stamp collection, grandfather clock etc.

Cash Gifts: -

A certain amount of money that you wish to leave a loved one.

Residuary Beneficiaries: -

After deciding specific gifts and monetary legacies, the balance of your estate is the residue.

You can either leave your residue in shares or percentages e.g.
(e.g. 75 shares divided as to: 10 shares to John, 50 shares to Paul and 15 shares to Fred) OR
(50% to John, 30% to Paul and 20% to Fred - N.B must add up to 100%)