

WILL QUESTIONNAIRE

THIS IS AN IMPORTANT DOCUMENT. PLEASE TAKE YOUR TIME TO COMPLETE THIS AS FULLY AS POSSIBLE.

Personal Details:

- Please state your full name and title.
- Please state your full address and postcode.
- If applicable, please state your Spouse/Partner's full name and address.

Your Details:	Your Spouse/Partners Details:
Title:	Title:
Forenames:	Forenames:
Surname:	Surname:
Address:	Address:
Tel No:	Tel. No:
E-mail address:	E-mail address:

Executors:

Executors (also referred to as Trustees) are the person(s) that you nominate to carry out the work of administering your estate and other instructions in your Will. Executors must be over the age of 18, and can be anyone of your choice. You can choose your spouse /Partner to be your first choice of executor. If for any reason, the first executor is unwilling or cannot act, we suggest that a second executor should be chosen.

- Please state full name and address of Executor (s).
- Please state your relationship to each Executor.

Executor (1):	Executor (2):
Name:	Name:
Address:	Address:
Relationship to you:	Relationship to you:

Guardian:

Appoint people who will look after your minor children (under 18) after your death or on the death of your spouse/partner. Choose people who will be acceptable to both sides of the family. They can also be a Beneficiary and/or Executor(s).

- Please state the full name and address of Guardian(s).
- Please state your relationship to them. E.g. sister, friend.

Guardian (1):	Guardian (2):
Name:	Name:
Address:	Address:
Relationship to you:	Relationship to you:

Legacies:

(Specific items/gifts):

If you wish to leave a legacy i.e. a gift, identify each item as carefully as possible, e.g. 'My gold Rolex watch'. If you wish to leave a general possession that may be regularly changed, enter something like 'Any motor car owned by me at the time of my death'. When leaving a gift you must decide whether the gift is to be given on your death or the death of your spouse/partner should you die before them.

- Please state the full name and address of your chosen beneficiary(s).
- Please give exact details of the gift.

Beneficiary (1):	Beneficiary (2):
Name:	Name:
Address:	Address:

Details of the gift:	Details of the gift:

Beneficiary (3):	Beneficiary (4):
Name:	Name:
Address:	Address:
Details of the gift:	Details of the gift:

(Gifts of money):

These gifts are usually paid free of tax calculations i.e. Inheritance Tax is paid from the Residuary Estate and the recipient is paid the whole amount shown. Use this section to gift a specific amount of money, contents of bank accounts, stocks, shares or any part of your estate that may be subject to tax calculations. If you wish to gift monies to charity(s), enter in this box.

- Please state the full name and address of your chosen beneficiary(s).

- Please state the amounts to be given.
- Please state the details of account and certificate numbers, if applicable.

If gifting to charity, state amount of monies and the name of the charity with their Charity Registration number.

Beneficiary (1)	Beneficiary (2)
Name:	Name:
Address:	Address:
Details of the gift:	Details of the gift:
Beneficiary (3):	Beneficiary (4)
Name:	Name:
Address:	Address:
Details of the gift:	Details of the gift:

Residue:

The residue is everything left in your estate after debts; funeral expenses and any legacies/gifts have been paid. In a standard family Will, the residue will be left to your spouse/partner, but should that spouse/partner die before you, the residue will then pass to your children (if any) and then grandchildren (if any).

If you have children that you wish to benefit:

- Please state the children's full names and your relationship to them (i.e. son, step-daughter).

The children, if more than one, will be the equal beneficiaries of your residuary estate, unless you indicate otherwise in the 'Any other Comments' box at the end of the form.

- Please state what age you wish your child/ren to inherit i.e. 18, 21, 25 years

If you wish someone other than your spouse/partner or children (if applicable) to benefit or if you are single, do not have children, or you wish your residuary estate to pass to other relatives/friends, ignore the children's section and complete the 'named beneficiaries' section.

You can nominate a named beneficiary(s) to your residuary estate, in the appropriate 'named beneficiary' box. If more than one beneficiary is to be named, indicate the share (%) that you are giving to each. For example, Mrs A (my mother) 60% and Mr B (my friend) 20% and Ms C (my cousin) 20%. Charities can also be named in this section - state what percentage of your residuary estate you wish to give.

<p>After legacies, gifts (if any), and funeral expenses do you want the residue of your estate to pass firstly to your spouse/partner?</p> <p>Yes/ No/ Not applicable</p>
<p>And/or then, residuary estate to pass on to children (if any)?</p>
<p>Yes/ No</p>

If yes, please state the full names of the children, their ages, and relationship to you below:
If no, please go to the 'Other named beneficiaries' section below:

Child (1)	Child (2)
Name:	Name:
Address:	Address:
Relationship to you:	Relationship to you:
Child (3)	Child (4)
Name:	Name:
Address;	Address:

Relationship to you:	Relationship to you:
At what age should your children inherit? i.e. 18,21,25	
Other named beneficiaries to benefit from your estate and in what share %:	
Name:	Name:
Address:	Address:
% Share:	% share:

Reserve beneficiaries:

In case all your previous beneficiaries fail to survive you, it is best to name reserve beneficiaries; charities as well as people may be named in this section. People named in this section will only benefit from your residuary estate if all previously named beneficiaries die before you.

Reserve Beneficiary (1):	Reserve Beneficiary (2):
Name:	Name:

Address:	Address:
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Exclusions:

This section is to be used if there is any person(s) that you do not wish to benefit from your estate but who may feel they have been overlooked as an oversight and have claim on your estate or part of it.

- Give full name and address of person(s) to be excluded.
- State your relationship to them.
- Briefly explain why you do not wish to leave them anything.

Name:	Name:
Address:	Address:
Relationship to you:	Relationship to you:
Reason:	Reason:

Business Interests:

When the Testator has a business, it may be important that the business can carry on trading and earning an income without him/her. This clause gives the Executor(s) sufficient flexibility to make the appropriate decisions (i.e. whether to sell or continue with the business) without being liable for any losses. This is only if you are a sole trader or partner, shares in a limited company should be given as a legacy.

- Give the full name and address of your business and whether you are a sole trader or partner.

Name of business:
Address of Business:
Trading As: Sole Trader/Partnership

Organ Donation:

An expression of a wish to reinforce the intentions declared by carrying a Donor Card.

Do you wish to donate your organs? Yes/ No

Funeral Requests:

Requests can be recorded in your Will but relatives and friends should also be informed separately.

- Please specify what your preference is.

Buried/ Cremated/ Do not wish to specify

Storage:

For complete peace of mind, we offer a competitive price of £10.00 p.a. to store your Will. We strongly recommend that your Will is stored in fire proof storage, away from any destruction or chance of theft.

Do you wish to use our storage facility?

Yes/ No

Other Comments Box:

- Please complete this box if there is anything further that you wish to add.

Thank you for completing this form. Please now sign and date this form and return the same together with your payment.

Signed _____

Date: _____