

Will Questionnaire

1. ABOUT YOU

Your Full name			
Your Full address			
Date of Birth			
Your telephone Number			Your email address
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 PARTNER/HUSBAND/WIFE

Full name			
Full address			
Date of Birth			
Are you married to your partner? YES / NO			
Year of marriage:			
If you are not married, are you intending to marry/re-marry in the near future. If yes, please give the full name and address of the person you expect to marry or form a civil partnership with.			
Have either of you been married before? YES / NO			

3. YOUR CHILDREN

Full name	
Full address	
Date of Birth	
Details of children of your Husband/Wife/Partners previous marriages or relations	

***Please note illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children. Any children excluded from benefit under your Will may have a right to claim a share of your estate in certain circumstances. Please ask for advice if appropriate.**

4. CURRENT WILL OR CODICIL

Do you already have a will or codicil in place?	YES / NO
If yes, please provide the following information: Date of existing will: Do your current wishes differ greatly from your last will? YES / NO If so, please provide details:	

1. YOUR ASSETS

Is your home owned?	YES / NO
If 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.
If not owned, please provide more details e.g. rented or other.	
Do you have a business?	YES / NO
If yes, please provide details e.g. company/partnership/sole trader.	
Please provide details of your main assets and approximate values.	
Do you have any jointly owned assets? If so, please give a general description and their approximate values.	

***Please note: Jointly owned assets generally pass to the joint owner automatically and cannot be given away by will.**

Do you own any assets abroad? If yes, please give a general description and their approximate value.	
--	--

2. FUNERAL INSTRUCTIONS

You may specify in your will funeral directions.
--

Buried	YES / NO
Cremated	YES / NO
No preference	YES / NO

***Please note that you should make these wishes known 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 you family and your doctor and carry a donor card.**

6. EXECUTORS

You must appoint executors to carry out the instructions in your will. You may appoint as many executors as you wish but no more than four may apply for a grant of probate in respect of your estate.

It is wise to have at least two executors, and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable or unwilling to act. Family members and/or trusted friends are usually appointed as executors.

If you wish to appoint a professional, independent executor this is possible. Please note that the Partners of our firm will be pleased to act as your executors either alone or with a member of your family or friend. We can discuss this further at our meeting if this is something you would like to consider.

Full name	
Date of Birth	
Full address	

Full name	
Date of Birth	
Full address	

Full name	
Date of Birth	
Full address	

If your chosen executor (s) cannot act, or they die before you, who should replace them as executor(s)?

Full name	
-----------	--

Date of Birth	
Full address	

Full name	
Date of Birth	
Full address	

Would you like Attwaters Solicitors to act as Executor? YES / NO

7. GUARDIANS

You may wish 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 deceased. The position may be different if you are a single parent. Guardianship involves a great amount of responsibility, and we would suggest you ask any intended guardian to agree to act before appointing them.

Full name	
Date of Birth	
Full address	

Full name	
Date of Birth	
Full address	

8. BENEFICIAIRES

The main part of your estate is called 'the residue'. Before giving away the residue, you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends, charities etc. These will be known as "beneficiaries".

Cash gift	
Full name	
Amount of cash gift (£)	
Date of Birth	
Full address	

Cash gift	
Full name	
Amount of cash gift (£)	
Date of Birth	
Full address	

Cash gift	
Full name	
Amount of cash gift (£)	
Date of Birth	
Full address	

Cash gift	
Full name	
Amount of cash gift (£)	
Date of Birth	
Full address	

Gift of Article	
Full name	
Description of gifted item	
Date of Birth	
Full address	

Gift of Article	
Full name	

Description of gifted item	
Date of Birth	
Full address	

Gift of Article	
Full name	
Description of gifted item	
Date of Birth	
Full address	

7. GIFTS TO CHARITY

Your estate may be able to claim a reduction on the rate of inheritance tax, if you give 10% or more of your estate to charity. Please ask for further details if you wish to consider this.

Name of charity	
Amount (£)	

Name of charity	
Amount (£)	

8. THE RESIDUE

This is all that you own except jointly owned property and specific gifts made in section 8.

Please state below who is to receive the residue on your death and who is to receive it if they predecease you. If there are gifts to your children, we may suggest a provision that if any of them die before you, leaving children of his/her own, those children (your grandchildren) will inherit their parents share.

The following are common provisions made, and if you wish to use on these, please tick the appropriate paragraph. In the alternative, please go to section 10.

- (a) Everything to my husband/wife/partner named at Section 2 above outright, but if he/she has died then to my children named at section 3 above, equally.**

(b) Everything to my children, named at section 3 above, equally and any other children of mine.

*Please note that you may choose the age at which your children will receive their entitlement. If it is not selected, the default position is 18 years old, but you can elect that they do not inherit until they reach 21 / 25 years old.

(c) To my husband/wife/partner named at section 2, but if he/she has died before me to the person(s)/organisation(s) named in the box below.

If not in equal shares, then show the share each is to take:

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?

Full name	
Date of Birth	
Full address	

Full name	
Date of Birth	
Full address	

9. LASTING POWERS OF ATTORNEY

Do you have an enduring or lasting power of attorney in place	YES / NO
---	----------

10. PLEASE PROVIDE DETAILS OF ANYTHING ELSE YOU THINK IS RELEVANT AND WE OUGHT TO KNOW