

**Will Questionnaire**

Please complete this questionnaire as fully as possible before you see us. 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. YOUR DETAILS**

Forename(s) .....

Surname .....

Address .....

..... Postcode .....

Telephone number .....

Date of Birth .....

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 HUSBAND/WIFE/PARTNER**

Forename(s) .....

Surname .....

Date of birth .....

Occupation .....

**3. MARRIAGE/PARTNERSHIP DETAILS**

Year of marriage .....

Are you married to your partner? Yes/No

Are you intending to marry/remarry in the near future? Yes/No

Has either of you been married before? Yes/No

**4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP) – full names, dates of birth, and address (if different from yours).**

(a) Name ..... Date of birth .....

Address .....

.....

- (b) Name ..... Date of birth .....  
 Address .....
- (c) Name ..... Date of birth .....  
 Address .....
- (d) Name ..... Date of birth .....  
 Address .....

**5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER'S PREVIOUS MARRIAGE OR RELATIONSHIPS**  
 – full names, dates of birth and address (if different from yours).

- (a) Name ..... Date of birth .....  
 Address .....
- (b) Name ..... Date of birth .....  
 Address .....

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

**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 husband/wife/partner? Yes/No
  - (iii) in the sole name of your husband/wife/partner? Yes/No
- (b) rented? Yes/No
- (c) other – e.g. provided by a relative? Yes/No

If your answer was (c) please give more details: .....

.....

.....

**7. DO YOU HAVE A BUSINESS?** Yes/No

If yes – state type of business .....

8. YOUR MAIN ASSETS

Please list your other main assets below and give approximate values: .....  
.....  
.....  
.....

9. JOINT ASSETS

Do you have any jointly owned assets? If yes, give a general description and their approximate values and the name(s) of the other owner(s).

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

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

10. DO YOU OWN ANY ASSETS ABROAD?

If yes, please give details .....  
.....

**PART C – FUNERAL, EXECUTORS, GUARDIANS**

11. FUNERAL

You may specify in your Will if you wish to be buried or cremated. Please specify preference:

.....

**Please note:** 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 your family and your doctor and carry a donor card.

12. EXECUTORS

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so.

(a) Name .....  
Address .....  
.....

(b) Name .....  
Address .....  
.....

### 13. GUARDIANS

You may want 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 dead. The position may be different if

you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name .....

Address .....

(b) Name .....

Address .....

### **PART D – BENEFICIARIES**

The main part of your estate is called "the residue". (This is dealt with at question 16.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

### 14. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

(a) Name .....

Address .....

Amount £.....

(b) Name .....

Address .....

Amount £.....

(c) Name .....

Address .....

Amount £.....

(d) Name .....

Address .....

Amount £.....

15. GIFTS OF ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that 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 the cash equivalent.

- (a) Name .....  
Address .....  
.....  
Article .....
- (b) Name .....  
Address .....  
.....  
Article .....
- (c) Name .....  
Address .....  
.....  
Article .....
- (d) Name .....  
Address .....  
.....  
Article .....

16. THE RESIDUE

This is all that you own except jointly owned property and the gifts made in questions 14 and 15. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent’s share.

The following are the more common provisions made.

- (a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally.
- (b) Everything to my children, named at question 4 above, equally and any other children of mine. You may choose the age at which your children will receive their entitlement. Please state your preference: 18, 21 or 25 years.
- (c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named below. If not in equal shares, then show the share each is to take.

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

17. IF NONE OF THE ABOVE CHOICES ARE APPROPRIATE

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

- (a) Name .....
- Address .....
- .....
- Share .....
- (b) Name .....
- Address .....
- .....
- Share .....

Who is to benefit if the recipient dies before you?

- (a) Name .....
- Address .....
- .....
- Share .....
- (b) Name .....
- Address .....
- .....
- Share .....

18. DO YOU WISH to leave a cash sum or percentage of your residue to a charity? If so, please provide details:-

- Name of Charity .....
- Address of Charity .....
- .....
- Registered Charity No: .....
- Amount to be left (£) or percentage of Residue .....

**GENERAL NOTES**

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