

WILL INSTRUCTIONS \ QUESTIONNAIRE

In order that we may prepare a Will which suits your circumstances, we should be grateful if you could complete, as far as possible, the following details:-

1. PERSONAL DETAILS

Full Name (Mr \ Mrs \ Miss \ other)
(Including middle names)

Full name of Spouse \ Partner (Mr \ Mrs \ Miss \ other)
(Including middle names)

Full Address(es)
.
.

Postcode

Telephone Numbers (HOME) (WORK)

Occupation (MR) (MRS \ Partner)

Dates of Birth (MR) (MRS \ Partner)

Marital Status (Note – marriage subsequent to a Will cancels the Will)

Have you ever been widowed? YES \ NO Permanently Resident in the UK? YES \ NO

Have made a Will before? YES \ NO. If YES, where is the Original

2. FAMILY DETAILS

Children:	Full Names	Full Address(es)	<u>POSTCODE</u>	DOB's	Status*
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* Natural, adopted, step-child, any mental or physical handicap

Grandchildren:	Full Names	Full Address(es)	<u>POSTCODE</u>	DOB's
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---- PLEASE CONTINUE OVERLEAF IF NECESSARY ----

3. YOUR ESTATE

This information may only be essential if your estate either exceeds the Inheritance Tax threshold or contains unusual assets. Please therefore complete as far as possible.

BRIEF DETAILS

ESTIMATED VALUE SELF £ SPOUSE

- 3.1 Do you own the property? YES \ NO
If so, in whose name are the Deeds? _____
Where are your Deeds stored? _____ **TITLE NUMBER** _____
Is the property still mortgaged? YES \ NO
Have you taken out life cover? YES \ NO

OR Do you rent the property? YES \ NO
- 3.2 Stocks and Shares (Quoted or Unquoted)
- 3.3 Unit Trusts \ Investments \ Trusts \ PEPs
- 3.4 Bank Accounts
- 3.5 Building Society Accounts
- 3.6 National Savings Accounts
- 3.7 Insurance Policies
a) Life
b) Pension
c) Investment
- 3.8 Business or Agricultural Property
- 3.9 Foreign Property
- 3.10 Property in Trusts of which you are a beneficiary and in trusts over which you have a general Power of Attorney
- 3.11 Lifetime Gifts made - When To Whom Amount
- 3.12 Other

Estimated Value of Estate

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N.B. - **PENSIONS** - Any nominations as to recipient of fund been given to Trustees of any Pension Scheme If so, when?

Name of Scheme

Address of Trustees

Pension Number (if any)

4. CONTENT OF WILL \ DIVISION OF ESTATE

A. **FUNERAL** - Do you wish to be buried or cremated? Do you have a pre-paid funeral plan?

B. **EXECUTORS** – The people you want to administer your estate following your death. A minimum of two Executors will be required if children named in the Will are under the age of 18 or a trust is to be created under the Will. An Executor can be a beneficiary but must not witness the Will

<u>Executors Full Names</u>	<u>Full Address(es)</u>	<u>POSTCODE</u>	<u>Relationship to you</u>
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.....
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.....

C. **GUARDIANS** – To be chosen if children are under the age of 18.

D. **SPECIFIC GIFTS OF BUSINESS \ AGRICULTURAL PROPERTY**

E. **OTHER SPECIFIC GIFTS (i.e. Jewellery, Antiques etc)**

<u>Full Beneficiary Name</u>	<u>Full Address(es)</u>	<u>POSTCODE</u>	<u>Article (brief description)</u>
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F. **CASH LEGACIES**

<u>Full Beneficiary Name</u>	<u>Full Address(es)</u>	<u>POSTCODE</u>	<u>Sum of Money</u>
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.....

G. **THE RESIDUE OF YOUR ESTATE**

<u>Full Beneficiary Name</u>	<u>Interest (Absolute \ Conditional)</u>	<u>Proportion of Residuary Estate</u>
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.....
.....

Please provide full names and address(es) and Status (son, daughter, etc) if not previously mentioned in this Questionnaire

---- PLEASE CONTINUE OVERLEAF IF NECESSARY ----

H. WHO WILL INHERIT IF NONE OF THOSE LISTED IN 4G SURVIVE YOU?

IF A CHARITY – PLEASE PROVIDE THE FULL CORRECT ADDRESS AND CHARITY NUMBER (IF KNOWN)

I. ANY ADDITIONAL COMMENTS OR RELEVANT INFORMATION?

J. HAVE YOU MADE PROVISION FOR ANY PETS?

DATE FORM COMPLETED:- _____