

Preparing your will

Questionnaire

Name

Address.....
.....

Email

Tel.....

Marital status

Name of partner/spouse

Names and ages of children.....

Do you and/or your partner/spouse already have a will?

Your Assets

1 Property occupied as your main home

Do you own the property you occupy as your main home? Yes No

If yes, what is the approximate value of your home? £.....

What is the approximate value of any mortgage over your home? £.....

Is the property owned in your sole name or jointly?

sole name joint tenants* tenants in common**

* 'joint tenants' – the house will pass to the survivor of you automatically regardless of the will.

** 'tenants in common' – you can each leave your share of the house to whomever you choose in your will.

2 Bank, Building Society or other accounts

Approximate value of your accounts (in total) £.....

Approximate value of partner's/spouse's accounts (in total) £.....

Approximate value of any joint accounts (in total) £.....

3 Personal belongings

Approximate value of your belongings £.....

Approximate value of partner's/spouse's belongings £.....

Approximate value of any joint belongings £.....

4 Life assurance and pension policies

Are the policies in trust?

Approximate value of your life assurance policies £..... Yes

Approximate value of your pension policies £..... Yes

Approximate value of your partner's/spouse's life assurance policies £..... Yes

Approximate value of your partner's/spouse's pension policies £..... Yes

5 Investments

Approximate value of your investments £.....

Approximate value of partner's/spouse's investments £.....

Approximate value of any joint investments £.....

6 Assets situated outside the UK

Type of assets (if any) and where situated

Approximate value of assets (in total) £.....

Do you and/or your partner/spouse have a will in respect of these assets? Yes No

7 Other assets

Do you own any other assets not previously referred to in this questionnaire (e.g. other land/property, shares or other interests in a business) or do you have an interest under a trust and/or an expectation under a will?

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8 Foreign citizenship or residence

Please state if you and/or any of your immediate family have ever lived or worked abroad, or if there are any other foreign citizenship or residence issues of which you are aware:

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Help sheet

Main points to consider in advance of making your will

Thank you for completing our will questionnaire. Having now taken the first step towards preparing your will, you may also wish to read through and consider the following points, each of which is an important detail to consider when making a will. Should you have any queries about any of the points listed or the options available to you, please do not hesitate to contact a member of our team using the contact details listed at the bottom of this page.

Executors Who would you like to act as your executors? Ideally you should appoint at least two executors. Unless it gives rise to tax concerns in another jurisdiction, you may wish to appoint your spouse/civil partner as an executor.

Guardians You may appoint guardians of your children under the age of 18. Generally speaking, the appointment of the guardian will only take effect when both you and the child's other parent have died.

Beneficiaries You may wish to include specific gifts of personal belongings, other property or cash gifts in your will. These may go to either family members, friends, or to one or more charities.

Residue Your residuary estate is what is left after your executors have paid all debts, expenses, tax, administration costs and legacies.

Gifts Gifts to your spouse/civil partner may be made outright or on continuing trusts.

Gifts to children, grandchildren, nephews and nieces, and/or godchildren can also be made outright or on continuing trusts.

Default gifts - you should decide who you would wish to benefit in the event of the primary beneficiaries not surviving you.

For more information please contact:-

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