

WILL INSTRUCTION QUESTIONNAIRE

Private Client
Matrimonial
Litigation
Conveyancing
Commercial
Notary

(A) GENERAL INFORMATION

1. YOUR FULL NAME (include any aliases) :

ADDRESS: _____

TEL NO: Home: _____

Work: _____

EMAIL ADDRESS: _____

AGE: _____ OCCUPATION: _____

2. PARTNER'S FULL NAME:

ADDRESS: _____

(If different from the above)

TEL NO: *(If different from the above)* _____

AGE: _____ OCCUPATION: _____

IS YOUR PARTNER YOUR SPOUSE OR CIVIL PARTNER? YES NO

3. ARE YOU DIVORCED? YES NO

HAVE YOU HAD A CIVIL PARTNERSHIP DISSOLVED? YES NO

ARE YOU A WIDOW(ER)? YES NO

IF YOU ARE WIDOWED PLEASE ENSURE YOU COMPLETE SECTION 10 b. Page 7

4. DO YOU HAVE CHILDREN? YES NO

Please give details overleaf – including adopted children.

5. IS THERE AN EXISTING WILL ...

(a) For you? YES NO

(b) For your partner? YES NO

Where are they kept?

CHILDREN'S DETAILS

1. NAME : _____
 ADDRESS: _____
 AGE: _____

2. NAME : _____
 ADDRESS: _____
 AGE: _____

3. NAME : _____
 ADDRESS: _____
 AGE: _____

4. NAME : _____
 ADDRESS: _____
 AGE: _____

6 IS ANY CHILD ...

a.	from a previous relationship?	YES		NO	
b.	adopted?	YES		NO	
c.	a step-child?	YES		NO	
d.	subject to a "residency order"?	YES		NO	
e.	in the care of another person who may or may not have a residency order?	YES		NO	
f.	Is any child's natural parent (other than detailed above) living?	YES		NO	

7. GUARDIANS – FOR CHILDREN UNDER 18 YEARS

Your Guardians will be responsible for bringing up your children.

Please specify two and their relationship to you (if any)

For reasons, which may be explained, try and ensure you do not appoint the same people as both Guardians and Executors (See 8 below).

a. Name: _____

Address: _____

Occupation: _____ Relationship: _____

b. Name: _____

Address: _____

Occupation: _____ Relationship: _____

Is there anyone who has been appointed by the Court as having "Parental Responsibility" for any child?

YES

NO

8 EXECUTORS

Your Executors will be responsible for collecting and securing your assets, paying your debts, funeral expenses and any tax and, for distributing your estate in accordance with the terms of your Will.

A husband and wife/civil partners will usually appoint each other and on the death of the survivor of them appoint two other persons. Your children who are adults may act. You will need to have at a minimum of two Executors if there are minor beneficiaries.

a. Name: _____

Address: _____

Occupation: _____ Relationship: _____

b. Name: _____

Address: _____

Occupation: _____ Relationship: _____

9. DOMICILE / RESIDENCY - General Notes

UK residents are liable to UK Income Tax on UK and foreign income.

- Non UK residents are subject to Income Tax only on the income arising in the UK and not that abroad.
- If you are resident in the UK but not domiciled in the UK then you pay tax on foreign income only in so far as it is brought into the UK.
- Residence and Ordinary Residence – the requirements laid down by the Revenue to determine whether or not you fall into either definition are complex and regrettably beyond the scope of this note.
- Domicile - is where you have your permanent home (i.e. your place of birth). Your domicile may affect taxes payable in the event of your death.

- (a) Where are you resident for Income Tax purposes? _____
- (b) Where is your country of domicile? _____
- (c) To where do you intend to retire? _____
- (d) Is the Property to be covered by this Will.....?
 - (i) Worldwide _____
 - (ii) UK only _____
 - (iii) Other specifically _____

Please note – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we will either provide such advice for an additional fee or we will direct you to alternative specialist advice.

(B) SPECIFIC ISSUES – Please give brief details

10. DO ANY OF THE FOLLOWING AFFECT YOU?

a. IS YOUR ESTATE WORTH MORE THAN £325,000? YES NO

Please note – It is possible that your estate will be subject to Inheritance Tax on your death and that the amount of tax charged will depend on the nature of the provisions contained in your Will. For this reason, advice on Inheritance Tax is commonly a feature of a comprehensive Will drafting service unless expressly excluded.

We will advise you as to the likely Inheritance Tax consequences of the provisions which you have asked us to include in your Will on the basis of the information which you have given to us. However, we will not advise you as to the most efficient method of drafting your Will or give advice in lifetime planning as part of our standard Will drafting service. However, if you ask us to do so we will provide such advice for an additional fee.

b. **WIDOW(ER)/CIVIL PARTNERS**

YES	NO
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(i) When did your spouse/partner die?

(ii) Did you Inherit the whole of your spouse/partners estate?

c. ARE ANY OF YOUR BENEFICIARIES MENTALLY IMPAIRED?

Please state their name(s) and age(s). YES NO

d. IF YOU ARE DIVORCED / SEPARATED / PREVIOUS CIVIL PARTNERSHIP.

Have your financial affairs been sorted out? YES NO

e. IF YOU HAVE CHILDREN FROM A PREVIOUS RELATIONSHIP.

Are you keen to protect their interests? YES NO

f. DO YOU HAVE ANY DEPENDENTS OTHER THAN CHILDREN?
E.G. Your Spouse, Former Spouse, Civil Partner, Former Civil Partner, Co-Habitee, Elderly Relatives

YES NO

g. ARE THERE ANY DEPENDENTS YOU DO NOT INTEND TO PROVIDE FOR IN THIS WILL?

YES NO

Please note – The Inheritance (Provision for Family and Dependents) Act 1975 may enable certain persons to seek additional provision out of your estate after your death. If an application is made under this act it is likely to involve your estate in expense and may result in a variation of the dispositions made in your Will.

If the information which you provide to us for the purposes of preparing your Will suggests that there is a real risk of such an application being made in respect of your estate, we will advise you that this is the case. However, we will not offer more detailed advice in relation to the 1975 Act unless you ask us to do so and, in those circumstances, an additional fee will be charged.

h. DO YOU HAVE CREMATION / BURIAL WISHES? - if so, please give details

YES NO

i. DO YOU WANT THE COST OF ANY MEMORIAL TO BE PAID FOR OUT OF YOUR ESTATE?

YES NO

Please ensure you provide full and accurate descriptions. If there is confusion on your death, the gift may fail for uncertainty.

A Beneficiary is the person you would like to receive the gift.

Item	Full name & address of Beneficiary and age at which they are to inherit	Is gift to be free of/subject to tax/mortgage?

Ask yourself:-

- (a) Do you want all of these gifts to occur on your death, or after the death of your spouse / partner?
- (b) Has any gift been sued as a security for a loan and if so is it given free of that loan?

12. LEGACIES i.e. a sum of money

Amount £	Full name & address of Beneficiary and age at which they are to inherit	Is gift to be free of/subject to tax/mortgage?

13 REMAINDER OF YOUR ESTATE

This is everything that is left after the payment of your debts etc and of the specific gifts and legacies given in 11 & 12 above.

- a. Do you want the remainder of your estate to go to your spouse / partner / civil partner?

YES NO

- b. If not, where do you want it to go? To your children, in what shares and at what age?
Other relatives? Friends?

- c. If those in (a) & (b) above predecease you, where do you want it go?
If a child had predeceased you leaving children of their own (your grandchildren) do you want that child's share to be split between their children? If so in what shares and at what age?

- d. If none of the above survive you where do you want it to go? Charities?

PLEASE SIGN

I have given the relevant information you need to know to make a suitable Will for me.

I understand that if I have any special requirements you will be willing to offer this at an additional charge.

Please prepare a Will for me based on the information I have given.

When the instructions are joint would each person please sign

Signed _____

Signed _____

Please return to Ward Gethin

ASK ANY QUESTIONS BELOW

Please tick the appropriate boxes to indicate whether you would like to receive newsletters and other information by e-mail on any of the following topics:-

- Family Employment Litigation Landlord & Tenant Property Company Wills/Probate