

Will Questionnaire

This form is designed to give us some preliminary information about you and your family and your wishes for your Will. Please complete the form in readiness for our meeting or (if no meeting has been arranged) return the form to us. You may not be able to answer all the questions, but it would be helpful if you could complete as much of this form as possible.

Couples who wish their wills to mirror each other can complete just one questionnaire with all the details, but should feel free to complete separate questionnaires if they prefer.

1 Personal Details	
Spouse/Partner 1	Spouse/Partner 2
Surname:	Surname:
All forenames:	All forenames:
Any other name you use or have used:	Any other name you use or have used:
Date and place of birth:	Date and place of birth:
Nationality:	Nationality:
Occupation:	Occupation:

2 Married couples and civil partners
Date and place of marriage (or civil partnership):
Did you sign a pre-nuptial agreement? Yes <input type="checkbox"/> No <input type="checkbox"/>
Details of any previous marriages or civil partnerships:

3 Unmarried and non-civil partner couples
How long have you been together?
Do you intend to marry or become civil partners in the near future? Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you sign a cohabitation or similar agreement? Yes <input type="checkbox"/> No <input type="checkbox"/>
Details of any previous marriages or civil partnerships:

4 Contact details	
Address:	
Post code:	
Telephone numbers	Home: Work: Mobile:
E-mail address(es):	

5 Family details <small>(Please continue on an extra sheet of paper if necessary)</small>	
Children <small>(Please indicate if any is a child of just one of you, whether any have special needs and whether they are single, married, divorced or separated)</small>	
Full Name:	Date of birth:
Full Name:	Date of birth:
Full Name:	Date of birth:
Grandchildren	
Full Name:	Age:
Full Name:	Age:
Full Name:	Age:
Full Name:	Age:
Details of any dependants other than children or grandchildren:	

6 Assets and liabilities <small>(Please continue on an extra sheet of paper if necessary)</small>		
Please summarise your assets and any liabilities (with approximate values) as indicated. In the case of couples, please distinguish between what belongs to each spouse or partner and what is owned jointly using the different columns.		
	In sole name	In joint names:
Your home: Address: Value: Freehold or leasehold:		If your home is owned jointly, is it held as joint tenants or tenants in common?

6 Assets and liabilities continued (Please continue on an extra sheet of paper if necessary)

Please summarise your assets and any liabilities (with approximate values) as indicated. In the case of couples, please distinguish between what belongs to each spouse or partner and what is owned jointly using the different columns.

	In sole name	In joint names:
<p>Any other houses or flats, land or buildings: Address:</p> <p>Value: Freehold or leasehold: Address:</p> <p>Value: Freehold or leasehold:</p>		<p>If the property is owned jointly, is it held as joint tenants or tenants in common?</p> <p>If the property is owned jointly, is it held as joint tenants or tenants in common?</p>
<p>Mortgages: Property: Lender: Amount outstanding:</p> <p>Property: Lender: Amount outstanding:</p> <p>Property: Lender: Amount outstanding:</p>		
<p>Life insurance (please indicate if any insurance is linked to a mortgage): Provider:</p> <p>Life/ves assured: Value:</p> <p>Provider: Life/ves assured: Value:</p>		
<p>Pension policies: Provider:</p> <p>Value:</p> <p>Provider: Value:</p>		

6 Assets and liabilities continued (Please continue on an extra sheet of paper if necessary)

Please summarise your assets and any liabilities (with approximate values) as indicated. In the case of couples, please distinguish between what belongs to each spouse or partner and what is owned jointly using the different columns.

	In sole name	In joint names:
<p>Bank or building society accounts:</p> <p>Bank/building society: Value:</p> <p>Bank/building society: Value:</p> <p>Bank/building society: Value:</p>		
<p>Stocks and shares etc:</p> <p>Value of portfolio: Investment manager:</p>		
<p>Other assets (e.g. cars, yachts, antiques, jewellery, etc.):</p> <p>Description: Value:</p> <p>Description: Value:</p> <p>Description: Value:</p>		
<p>Other liabilities (e.g. loans, credit cards):</p> <p>Lender: Amount outstanding:</p> <p>Lender: Amount outstanding:</p>		

7 Other matters

Have you made any gifts in the last seven years?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you have an interest in any trusts or expect any inheritance?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you live in any country outside the United Kingdom? Or is there any other country with which you are closely connected?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you own a business or are you a partner in a business? Or do you own any private company shares or agricultural property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

7 Other matters continued

Please give further details below if you have answered "Yes" to any of the questions above in section 7:

8 Other wills and documents

Please provide a copy of any existing Wills.

Where is/are the original(s) located?

Have you made an Enduring Power of Attorney or a Lasting Power of Attorney? Yes No

Do you have a Living Will (Advance Directive)? Yes No

9 Contents of your will (Please continue on an extra sheet of paper if necessary)

Please use this section to summarise what you want us to put in your Will. Feel free to give as much or little detail as you want. Please give any relevant names and addresses in full if these do not appear elsewhere in this questionnaire.

Who is to receive most (or all) of your estate?

Who else is to receive what?

What is to happen if the proposed recipient of any gift dies before you (or with you)?

9 Contents of your will continued (Please continue on an extra sheet of paper if necessary)

Please use this page to summarise what you want us to put in your Will. Feel free to use as much or little detail as you want. Please give any relevant names and addresses in full if these do not appear elsewhere in this questionnaire.

Do you have any particular requests about whether you should be (or should not be) buried or cremated or about the use of your body for, say, transplants or medical research?

Who are to be the guardians of any children under eighteen?
(Guardians have personal responsibility for orphaned children; the children will usually live with the nominated guardians after the death of both their parents. If you are a single parent, divorced from the other parent or a same sex couple, special rules may apply and you should discuss this with us.)

Who are to be executors and/or trustees?
(Executors and trustees are responsible for financial and legal issues. Ideally you should have more than one in case one of them dies before you or with you. You can appoint substitute executors and trustees who take the place of an executor or trustee who is unable or unwilling to act as executor or trustee.)