

Will Questionnaire

PERSONAL DETAILS:					
Client 1		Full Name Including middle names & any other names you are known by	Client 2		
YES	NO	Existing Will	YES	NO	
		NI Number			
		Date of Birth			
		Mobile Tel No.			
		E-mail address			
HOME ADDRESS:					
POSTCODE:					
HOME TEL:					
DETAILS OF CHILDREN & GRANDCHILDREN:					
NAME:		<i>Delete as appropriate</i>		AGE:	
		CHILD / GRANDCHILD			
		CHILD / GRANDCHILD			
		CHILD / GRANDCHILD			
		CHILD / GRANDCHILD			
		CHILD / GRANDCHILD			
DETAILS OF EXECUTORS: <i>(we can act as executors if required)</i>					
Mr/Mrs/Miss	FULL NAME:				
ADDRESS:					postcode
Mr/Mrs/Miss	FULL NAME:				
ADDRESS:					postcode
Mr/Mrs/Miss	FULL NAME:				
ADDRESS:					

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		postcode
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		
		postcode
DETAILS OF GUARDIANS (If required)		
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		
		postcode
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		
		postcode
The following information is required for us to assess any possible tax implications:		
Is the value of your assets (possessions, life policies, house etc) over £325,000 or £625,000 between you?	YES	NO
Is the value of your home over £325,000	YES	NO
If YES please insert a rough valuation	£	
How much is owed on the mortgage?	£	
Do you own property outside England & Wales?	YES	NO
If YES please insert a rough valuation <i>(in the local currency where the property is)</i>		
Do you have any other investments?	Value	
Stocks and Shares	£	
Other property <i>(eg: investment property that you rent)</i>	£	
Death in service benefit		X salary
Life insurance/assurance policies	£	
DO YOU HAVE ANY SPECIFIC BEQUESTS TO MAKE? <i>(specific items or amounts of money that you would like to leave to specific people?)</i>		
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		
		postcode
Details of the gift:		
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		

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		postcode
Details of the gift:		
Mr/Mrs/Miss	FULL NAME:	
ADDRESS:		
		postcode
Details of the gift:		
IS THERE ANY OTHER INFORMATION THAT YOU WOULD LIKE TO TELL US?		

	CLIENT 1	CLIENT 2
SIGN		
DATE		

If you have any specific funeral instructions or wishes please complete our Funeral Wishes checklist.

Probate Solicitors Ltd
Bentley Manor
Box Trees Road
Dorridge, Solihull
B93 8NP

01564 758055
info@psl-law.co.uk
www.psl-law.co.uk

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Please complete as much as possible – however don't worry if you have to leave out some information – we can call you to update it later

Personal Details

Your Name(s)

Your name here should be as appears on your birth certificate. Married women should use their married name if they are known by that. If you are married but still have accounts in a previous name please say so. If you have a name that you are commonly known by please advise. (e.g. John Joseph Smith also known as "Jack" Smith) If you are making identical "mirror Wills" then put both of your details here. If you are man and wife/civil partner but making different Wills please complete two separate forms.

Children

Please give details of any children EVEN IF THEY ARE NOT IN YOUR WILL. We are seeking to ascertain whether there will be anyone who might possibly be able to claim on your estate if you leave them out so that we can advise you accordingly. This includes adopted children, step-children and children that live with you that you treat as your own. This would not include short-term foster children unless they have been with you for a number of years and are treated as your own. If any children or any other beneficiary are mentally or physically disabled please let us know.

If you are unsure about anything please ask us when we call.

Executors (and Trustees)

Your Executors are the people who deal with your affairs after you die. Pay debts, collect money owed to you and pay any tax due. They also administer the gifts to your beneficiaries. Very often an Executor will appoint a solicitor or probate firm (like us) to do everything for them.

You need at least one Executor, two if you have a trust in your Will (e.g. there are beneficiaries under 18) the maximum is usually four. If you prefer then you can appoint us to be your independent executors. If you are man and wife/unmarried couple then it is usual to appoint each other in the first instance but someone else to administer the affairs on the second death.

Guardians

If you have children living with you under the age of 18 or who are physically or mentally handicapped whatever their age, then it is good practice to appoint someone to look after them. It is obviously best to obtain their prior permission. Normal you would appoint 2 guardians, often a man and wife couple, but you could appoint more if you think it appropriate. More than 4 however is probably unworkable. Your Guardians **can** also be your Executors/Trustees although it is sometimes better for them to be different to protect the children's inheritance.

Other Information

This might be that you are currently undergoing a divorce, you have assets or own property abroad, you are thinking of buying abroad ("abroad" includes Scotland, and Ireland for this purpose). If in doubt let us know.

Assets & Liabilities

We are not prying but to allow us to advise you properly we need to know how much you are "worth" so that we can calculate if you need to consider any particular scheme to save on Inheritance Tax which is currently 40%. As at April 2010 the personal exemption is £325000 including all assets, houses etc

Beneficiaries

Beneficiaries are the people who benefit from your Will i.e. the people you want to leave your belonging to.

This can be as simple or as complex as you like. You can leave specific items (e.g. jewellery) or specific amounts (e.g. £1000) to individuals. You can also leave "everything" to one person or equally between a number of them or give percentages (e.g. 10% to cousin, 25% to sister, etc)

Normally a beneficiary must be at least 18 to receive a gift, it will be held by your Executors until they are old enough. You can specify a later age although it is normal not to exceed 25 years old for other reasons.