

INDIVIDUAL WILL QUESTIONNAIRE – PROBATE SOLICITORS

1. YOUR DETAILS:

Title			
Client forenames		Surname	
IMPORTANT enter FULL NAME including middle names & any other names you are known by			
Please tell us how you heard about PSL?			
Existing Will?	YES	NO	
Status? (Please Circle)	Married / Divorced / Separated / Widowed / Never Married		
Have you ever been widowed?	YES	NO	
NI Number			
Date & Place of Birth			
Mobile Tel No.			
E-mail address			
Cremation or Burial Instructions			

2. YOUR HOME POSTAL ADDRESS:

POSTCODE:	
HOME TEL:	

3. DETAILS OF ANY CHILDREN & GRANDCHILDREN:

*This is for information only – it does not mean you are necessarily leaving them anything
Please also include any children who have predeceased you & write 'P' in the age column*

FULL NAMES	Tick if live at your property	Delete as appropriate	Current age
		CHILD / GRANDCHILD	
		CHILD / GRANDCHILD	
		CHILD / GRANDCHILD	
		CHILD / GRANDCHILD	
		CHILD / GRANDCHILD	
		CHILD / GRANDCHILD	

Please complete as much as possible.

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Are you continuing on a separate page?	YES	NO
Do you have any mentally or physically disabled children or grandchildren?	YES	NO

NB: If you have children from previous relationships you may wish to consider a Life Interest Trust Will that protects assets for your children whilst still allowing your partner to have a benefit from them whilst they are alive. If you have disabled children you may wish to consider setting up a trust for them. Please call us for more information.

4. DETAILS OF EXECUTORS: (we can act as executors if required; there may be a charge for this at the point we have to act; we will explain this to you)

Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
ADDRESS:			postcode
Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
ADDRESS:			postcode
Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
ADDRESS:			postcode

AND/OR I would like to appoint PSL as	MAIN EXECUTOR	SUBSTITUTE EXECUTOR
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5. DETAILS OF GUARDIANS OF CHILDREN (required if you have children under 18 years old)

Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
ADDRESS:			postcode
Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
ADDRESS:			postcode
Mr/Mrs/Miss	FULL NAME & RELATIONSHIP TO YOU:		
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6. YOUR WISHES – HOW YOU WANT YOUR ESTATE TO BE DISTRIBUTED?

Any specific items? (give us a detailed description of the item and the full name/address of the recipient)

Any gifts of money? (tell us how much and the full name/address of the recipient).

Any gifts to charity?

AMOUNT OR % OF RESIDUARY ESTATE	CHARITY	REGISTERED CHARITY NUMBER	ADDRESS

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What would you like to happen to the rest of your estate, ie anything not given away above?

%	FULL NAME OF BENEFICIARY & RELATIONSHIP TO YOU	ADDRESS

Wholly Fail - If you, your spouse/main beneficiary and children all died together then what would you like to happen to your estate?

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7. ASSETS OF THE ESTATE

How is your main residence owned? *(please circle one or call us for a full explanation of the terms)*

Joint Tenants	Tenants in Common	Not Sure		
ie: upon death your share automatically passes to the other	ie: you each have your own share of the property and upon death can leave it to whom you wish	ie: if you are not clear on the terms Joint Tenant & Tenants in Common please circle 'not sure'	Wholly owned by you	Rented

Approximate value of your home	£	How much is your mortgage?	£
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Value of any other properties (e.g. holiday home, buy to let property)	£
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Is your main home mortgaged?	YES	NO
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If YES	Interest Only?	Repayment?	Other?	Do you have anything in place to pay off the mortgage?
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ABOUT YOUR OTHER ASSETS:

Cash Savings	Listed Shares	Premium Bonds	Managed portfolio	Inheritance due	Non listed Shares	Other
£	£	£	£	£	£	£

DIGITAL ASSETS – Please note here what digital assets you have. Separately, please complete the Digital Assets Log

Social Media Accounts E.G Facebook, Instagram	E-mail Accounts E.G Hotmail, Outlook, Gmail	Online Bank Accounts E.G Monzo, Starling, Marcus	Other E.G William Hill, National Lottery

Approx. total value of savings & other assets (deduct loans)	£
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TOTAL VALUE OF ASSETS	£
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Do you own property outside England & Wales?	YES	NO
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Life insurance paid out on death?	£	Payable to?
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Do you have any death in service or pension funds that can be nominated in favour of a relative or third party?	YES / NO
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Approximate value of death in service or pension as above	£
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8. BUSINESS INTERESTS (please ignore this section if not applicable)

Is your business interest	Sole Trader	Private Ltd Company	Partnership	Limited Liability Partnership	Other
What is the name/trading name & address?					
How much of the business do you own?	%	Who owns the remainder?			
What does the business do?					
What is the approximate value of the whole business?	£				

9. GIFTS (please ignore this section if not applicable)

Have you made any gifts over £3000 in the last 7 years? If so please detail them below

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Will Questionnaire Guidance Notes

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) .

Children

Please give details of any children **EVEN IF THEY ARE NOT IN YOUR WILL**. We are trying to establish if there could be anyone who might possibly be able to claim against your estate should you leave them out; by telling us 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, you can appoint PSL to be your independent executors. If you are a 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 disabled 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

If you are currently undergoing a divorce, about to get married, you have assets or own property abroad or you are thinking of buying abroad ("abroad" includes Scotland, and Ireland for this purpose) then please let us know.

Assets, Liabilities & Inheritance Tax

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 give you some basic Inheritance Tax (IHT) advice. If your estate is complex and you need detailed IHT advice this can be provided at our hourly rate.

As at April 2023 the personal exemption or Nil Rate Band (NRB) is £325,000. There is also an extra exemption called the Residence Nil Rate Band (RNRB) which is set at a maximum of £175,000 per person although this is subject to certain qualifications.

Beneficiaries

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

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