

## Wills Questionnaire

It will help when advising in regard to your Will if you can provide this information. Leave blank as appropriate. **This information will be treated as strictly confidential.**

Your name:	Name of Spouse / Partner (if appropriate):
Address:	Address (if different):
Email:	Email:
Occupation:	Occupation:
Date of Birth:	Date of Birth:
Marital status:	Marital status:

### Executors

Would you like to appoint each other as Executor? Yes / No

You also need to consider whom you would like to appoint if your spouse or partner does not survive you. You may select up to four but two may be more convenient:

Full name	Address (including postcode)	Occupation

### Guardians

If you and your spouse or partner die and leave children under 18 years of age, you may wish to appoint guardians to look after your children:

Full Name	Address (including postcode)

### Beneficiaries:

Please fill in details of beneficiaries. Please indicate if any children are not children of both you and your spouse/partner.

Full Name	Address (including postcode)	Relationship	Age

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*The answers to the following questions will clarify your Will requirements:*

	<b>Self</b>	<b>Spouse/Partner</b>
Have you already made a Will?	Yes/No	Yes/No
Have you been married or in a civil partnership before?	Yes/No	Yes/No
If so, did it end in divorce?	Yes/No	Yes/No
Are you a British Citizen?	Yes/No	Yes/No
Do you hold any assets outside the UK?	Yes/No	Yes/No
Is there any relative you wish to exclude from benefit?	Yes/No	Yes/No
Would you like to discuss inheritance tax planning?	Yes/No	Yes/No
Would you be interested in independent financial advice?	Yes/No	Yes/No
Do you complete annual Income Tax Returns?	Yes/No	Yes/No

### **Additional Issues for Consideration**

*You might like to give some thought to the following points prior to your appointment which may prove relevant in regard to your Will.*

- At what age would you like any children to be entitled to receive any benefit under your estates?
- Who should benefit if none of your children or grandchildren survive you?
- Do you have any particular gifts of money or particular items that you would like to make? If you have lots of specific items that you would like to specify or if you would like to retain some flexibility about gifting such items you might like to include separate instructions to your executors (which can be updated informally at any time) to be left with your Will.
- Would you like to make any charitable gifts in your Will? Any such gift will reduce any Inheritance Tax payable on your estate.
- Do you have any particular funeral wishes that you would like to specify in your Will?
- If you have a pension policy which is held by pension trustees to be dealt with at their discretion you will need to consider whether you have left a suitable expression of wishes to guide the trustees.

### **Asset Schedule**

It will be helpful in assessing your position to ensure your Will deals with your assets appropriately if you could complete the attached Asset Schedule. This will be of particular assistance if you wish us to consider your inheritance tax position.

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### Asset Schedule for Inheritance Tax Planning

Please enter estimates of the current value of your assets, gifts and liabilities to give an idea of the make-up of your estate. Where assets/liabilities are joint please enter shares::

<b>Assets</b>	<b>Self</b>	<b>Spouse/ Partner</b>
Private residence (tenants in common / joint tenancy)* (freehold/leasehold)*	_____	_____
Other houses, flats etc and land	_____	_____
Investments: - Bank and Building Society accounts	_____	_____
- TESSAs	_____	_____
- National Savings	_____	_____
- PEPs / ISAs	_____	_____
- Unit Trusts (non PEP)	_____	_____
- Stocks and Shares	_____	_____
- Investment Bonds	_____	_____
- Endowment policies (non mortgage)	_____	_____
- Other	_____	_____
Business assets: - Shares in private companies	_____	_____
- Share in partnership interests	_____	_____
Chattels, jewellery, works of art, cars, boats etc.	_____	_____
Life insurance: - Endowment policies (re mortgage)	_____	_____
- Whole of Life policies	_____	_____
- Term policies	_____	_____
- Death-in-Service	_____	_____
Interest in property held under Trust	_____	_____
<b>Total Assets:</b>	<b>=====</b>	<b>=====</b>
<b><u>Gifts</u></b>	_____	_____
Gifts (of over £3000 in any one year) made in the last 7 yrs	=====	=====
<b><u>Liabilities</u></b>		
Mortgage	_____	_____
Other loans	_____	_____
Overdraft	_____	_____
Other liabilities	_____	_____
<b>Total Liabilities:</b>	<b>=====</b>	<b>=====</b>

\* delete as applicable

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