

YOUR WILL

CLIENT QUESTIONNAIRE

This questionnaire is designed to ask you questions surrounding the terms and details of your will, this will assist us to prepare the first draft of your will

Office use only:

Appointment date.....timesolicitor's name.....

Please tick one box to indicate the service you require

- | | | | |
|----------------|--------------------------|---|--------------------------|
| Single Will | <input type="checkbox"/> | Mirror Wills for you and your spouse/partner | <input type="checkbox"/> |
| Single Codicil | <input type="checkbox"/> | Mirror Codicils for you and your spouse/partner | <input type="checkbox"/> |

PART A – YOU AND YOUR FAMILY

1. YOUR DETAILS:

Mr/Mrs/Miss/Ms/Other.....

Forename.....

Surname.....

Address.....

Postcode.....

Telephone No:.....

Date of birth.....

Occupation.....

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so please give full details below:

.....

.....

.....

Have you already made a will or codicil?

Yes/No

If yes, please give details below

Date of will/codicil:

Have you married or formed a civil partnership since you made your last will?

Yes/No

Do your current wishes differ greatly from your last will?

DOMICILE

Are you domiciled in the UK or elsewhere?

Yes/No

If not, please state where you are domiciled:

Do you want your will to cover your worldwide assets? If you have property in another country you may need to make a separate will for those assets and limit this will to exclude those assets.

Yes/No

2. EXECUTORS - Who do you want to act as your executors?

You must appoint executors to carry out the instructions in your Will, this person or persons will administer your estate and will be personally responsible for doing so. You can appoint up to 4 executors however most people appoint 2 and we recommend that at least two are appointed. It is common to appoint members of your family, close friends or your solicitors. We also recommend that you name replacement executors to act in the event that any of your executors cannot act.

1. Full Name.....

Date of Birth.....

Address.....

.....

Relationship to you:

2. Full Name.....

Date of Birth.....

Address.....

.....

Relationship to you:

3. Full Name.....

Date of Birth.....

Address.....

.....

Relationship to you:

If your chosen executor cannot act, or they die before you, who should replace them as executors

4. Full Name.....

Date of Birth.....

Address.....

.....

Relationship to you:

Would you like partners from our firm to act as your executor(s)

Yes No

3. YOUR HUSBAND/ WIFE/ PARTNER

Forenames.....
Surname.....
Any other names by which they are known
Date of birth
Address.....
Occupation

MARRIAGE/ PARTNERSHIP DETAILS

(a) Year of Marriage

(b) Please tick this box if you are not married to your partner

(c) Please tick this box if you are intending to marry/ re-marry in the near future

(d) Has either of you been Married before? Yes No

4. YOUR CHILDREN (including your children from a previous marriage or relationship) – full names, date of birth, and address if different from yours.

(a) Names.....	(Please add here if you have more children)
Date of Birth.....	
Address.....	
.....	
(b) Names.....	
Date of Birth.....	
Address.....	
.....	
(c) Names.....	
Date of Birth.....	
Address.....	
.....	
(d) Names.....	
Date of Birth.....	
Address.....	
.....	

5. CHILDREN OF YOUR HUSBAND/ WIFE/ PARTNER'S PREVIOUS MARRIAGES OR RELATIONSHIP – names, dates of birth and address if different from yours:

(a) Names..... Date of Birth..... Address.....
(b) Names..... Date of Birth..... Address.....

Please note:

- * Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- * Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

6. GUARDIANS

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the child's other partner are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name..... Address.....
(b) Name..... Address.....

PART B – YOUR HOME AND OTHER ASSETS

7. YOUR HOME – is your home:

- | | | | | |
|---|-----|--------------------------|----|--------------------------|
| (a) Owned: | | | | |
| i. In your name alone? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| ii. In joint names with your Husband/ wife/ partner | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| iii. In the name of your husband/wife/ partner alone? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| (b) Rented? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |
| (c) Other e.g. provided by relatives? | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> |

If your answer to (c) is 'yes' please give more details:

--

8. YOUR MAIN ASSETS

Please list your other main assets below and give approximate values:

1.....	Value.....
2.....	Value.....
3.....	Value.....

9. VALUE YOUR ASSETS

Your assets or what you own

	Value in £'s
Additional property or land.	£
Home Contents (Including furniture and fittings, electrical goods, TV, Video and audio equipment etc.)	£
Cars and other vehicles.	£
Items of individual value (including jewellery, art and antiques, cameras, etc.)	£
Savings in banks and building societies	£
Insurance and pensions	£
Shares and investments	£
National Savings, premium bonds etc.	£
Other assets	£
TOTAL ASSETS:	£

10. DO YOU HAVE A BUSSINESS? Yes No

If yes:- State type of business

Is it a (tick box)

Company Partnership In your sole name

11. JOINT ASSETS (if any)

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

1.

2.

3.

Please note: Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will.

12. DO YOU OWN ANY ASSETS ABROAD?

.....

13. YOUR LIABILITIES OR WHAT YOU OWE

	Value in £'s
Your Mortgage	
Overdrafts and loans	
Credit or HP agreements	
Others	
TOTAL LIABILITIES:	
YOUR TOTAL ASSETS, LESS LIABILITIES: (This is the estimated value of your estate at the present time)	

PART C - BENEFICIARIES

The main part of your estate is called “the residue” (this is dealt with at question 16.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, and friends or to charities. These will be known as “beneficiaries”.

14. GIFTS OF ARTICLES

Please give the name and address of the people to whom you wish to leave **specific items**, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or the cash equivalent.

<p>(a) Name..... Address..... Article.....</p> <p>(b) Name..... Address..... Article.....</p> <p>(b) Name..... Address..... Article.....</p>
--

15. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

<p>(a) Names.....</p> <p>Date of Birth.....</p> <p>Address.....</p> <p>.....</p> <p>Amount (£):</p> <p>(b) Names.....</p> <p>Date of Birth.....</p> <p>Address.....</p> <p>.....</p> <p>Amount (£):</p>
--

List the people and/or charities that you would like to **share the remainder** or residue of your estate once all of the above legacies have been made. These gifts are called residuary legacies.

16. BENEFICIARY/s

<p>1. Name..... Share.....</p> <p>Address..... Postcode..... Tel.....</p> <p>2. Name..... Share.....</p> <p>Address..... Postcode..... Tel.....</p> <p>3. Name..... Share.....</p> <p>Address..... Postcode..... Tel.....</p> <p>4. Name..... Share.....</p> <p>Address..... Postcode..... Tel.....</p> <p>5. Name..... Share.....</p> <p>Address..... Postcode..... Tel.....</p>

**Do you want to give anyone a right to occupy any of your property?
If yes, please select one of the following options:**

- i. Right to occupy for the rest of their life, but no trust arrangements
- ii. Right to occupy for the rest of their life under a life interest trust
- iii. Right to occupy for a period of time (for example, one year from death or until they find somewhere else)
- iv. Not sure but would like to discuss when we meet

17. LEGACIES AND CASH GIFTS TO CHARITIES

<p>1. Name of charity:</p> <p>Charity registration number:</p> <p>Address:</p> <p>Amount (£):</p> <p>Any special purposes or for general purposes of charity:</p> <p>If relevant, should the gift be on first death or after death of surviving spouse or partner:</p>
--

PART D – FUNERAL DESIRES

18. WISHES FOR FUNERAL OR DISPOSAL OF BODY

Please select ALL of the following option(s) you have chosen.

- Buried
- Cremated
- Woodland or ecological burial
- Disposal of body for scientific research
- Disposal of body for transplants or corneal grafting

Please give any other instructions below:

.....

.....

19. DECLARATION

Please prepare a Will or Codicil for me/us based on the instructions contained in this Instruction Form.

By signing the declaration I am/we are confirming that I/we have read, understood and confirmed the responses contained within this Questionnaire, I understand that upon my death my executors may request a copy of this questionnaire, or in the event that my will is disputed, the Court may request a copy of this questionnaire.

I/we certify that the information given in this form is true and complete and correctly represents my/our wishes.

This form was completed by: Myself..... or.....

Signature of applicant..... Date.....

Signature or spouse/partner..... Date.....
(If Mirror Wills/Codicils required)

Please return the completed form to Vas Solicitors at 278 High Street, Sutton, Surrey SM1 1PG

Further Information

Registering your will

Once your will is finalised and sealed, we recommend that you register it with the National Will Register who work together with Certainty Will Search, for more information their website is: www.nationalwillregister.co.uk.

Storing your Will

As we do not offer storage of wills at the firm, we have provided further details below of external will storage facilities that you may wish to consider:

National Will Safe

The National Will Safe allows you to store your will for a small annual fee that is currently £20 per year. National Will Safe will obtain their fee from you via direct debit on an annual basis, and as your legal representatives, National Will Safe will pay us a commission of £9.05 every year.

Court Probate Service

HM Courts and Tribunals Service also provides a Will Storage service which you may wish to consider. Currently there is a one-off fee of £23 to store your will at the Principal Probate Registry.

Alternatively, you may wish to store your will yourself and not use the above services, we can discuss the above services in our meeting and provide you with further information if you require.

In view of the above please confirm with who you would like to store your will?

National Will Safe

Court Probate Service

Store it yourself