

Wills Questionnaire

We want to make sure that your Will gives full expression to your own wishes and that it does not give rise to any unnecessary tax liability. To help us in achieving those aims, would you please let us have your replies to such of these questions as are relevant in your case? The questions are numbered and you may find it convenient to use the same numbering in giving your replies.

In some circumstances it may be desirable to supplement your replies by discussion before the Will is drafted. If you would prefer not to answer this questionnaire at all we would respect your decision but you should understand that it may take more time for us to be able to complete our meeting with you to get all the relevant details prior to commencement of the drafting of the Will.

You and your family

1). Your Details

Forenames _____
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:

Birth Name	Alias
_____	_____
_____	_____
_____	_____

2). Your husband/Wife/Partner

PLEASE NOTE: If you and your Partner do NOT want “mirror wills” then please ask us for a separate questionnaire for each of you. If the differences are only minor please make a note at the end of this form.

Forenames _____
Surname _____
Date of Birth _____
Occupation _____

3). Marriage/Partnership Details

- (a) Year of Marriage _____
- (b) Please tick this box if you are not married to/within a civil partnership with 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, dates of birth, and address if different from yours

Name _____
Date of Birth _____
Address _____

Name _____
Date of Birth _____
Address _____

Name _____
Date of Birth _____
Address _____

Name _____
Date of Birth _____
Address _____

5). Children of your husband/wife/partner's previous marriages or relationships – full names, dates of birth and address if different from yours

Name _____
Date of Birth _____
Address _____

Name _____
Date of Birth _____
Address _____

Name _____
Date of Birth _____
Address _____

Name _____
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.

Your home and other assets

6). Your home – is your home (please tick appropriate box):

(a) Owned

(i) in your sole name alone

(ii) in joint names with your husband/wife/partner

(iii) in the name of your husband/wife partner alone?

(b) Rented

(c) Other – eg shared with a relative?

7). If your answer was (c) please give more details. Please state if the person with whom you share the home (other than spouse or civil partner) has made any gifts to you in the past)

8). Do you have a business or are you self-employed?

Yes

No

If yes: - state type of business

Is it a (please tick the appropriate box):

Company

Partnership

In your sole name

9). Your sole assets

Please list your main assets below, including your home if you or your husband/wife/partner own the same, and give approximate values: - if you prefer to do so, please provide a total figure within a banding, ie home & savings of over £250,000.

10). Joint assets

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).

Asset	Value	Location
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

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

11). Do you own any Assets Abroad?

If yes, please give details:

Asset	Value	Name of other owner
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Funeral, executors, guardians

12). Funeral

You may specify in your Will if you wish to be:

Buried

Cremated

No preference

Please note:

* You should make these wishes known to your immediate family as well and not rely on what is in your Will

* If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card

13). Executors

You must appoint Executors to carry out the instructions in your Will. It is wise to have a least two and you may appoint your husband/wife/partner as one. You should name other Executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your Executors, either alone or with a member of your family or friend.

List below up to four chosen executors:

Name

Date of Birth

Address

Name

Date of Birth

Address

Name

Date of Birth

Address

Name

Date of Birth

Address

Would you like Warner Goodman to act as your executor?

Yes

No

14). 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 parent 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.

Name

Date of Birth

Address

Name

Date of Birth

Address

Beneficiaries

The main part of your estate is called "the residue". (This is dealt with at question 17). Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

15). Cash Gifts (pecuniary legacies)

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

Name

Age

Date of Birth

Address

Name

Age

Date of Birth

Address _____

Name _____

Age _____

Date of Birth _____

Address _____

Name _____

Age _____

Date of Birth _____

Address _____

16). Gifts of Articles or personal chattels

We normally recommend that these be listed in a Memorandum of Wishes to be left with the Will. This keeps the Will shorter and allows the list to be easily (and cheaply) changed if so wished at a later date.

17). The Residue

This is all that you own (except jointly owned property and the gifts made in questions 15 and 16). Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 18.

(a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally;

(b) Everything to my children, named at question 4 above, equally but if any of them has died to their children equally;

You may choose the age at which your children will receive their entitlement.

Insert choice from 18, 21 or 25 years in this box:

(c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s) organisation(s) named in the box below. If not in equal shared, then show the share each is to take.

18. If none of the above choices is appropriate

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

Name _____
Date of Birth _____
Address _____
Share _____

Name _____
Date of Birth _____
Address _____
Share _____

Who is to benefit if the recipient dies before you?

Name _____
Date of Birth _____
Address _____
Share _____

Name _____
Date of Birth _____
Address _____
Share _____

