

**Will Questionnaire**

This Questionnaire is designed to ask you the basic details about the terms of your Will and will allow us to prepare the first draft of the Will for your approval.

The usual fee for a straightforward Will, including any relevant advice, is £325 plus VAT (£390).

Where we prepare Wills for a couple, the normal fee would be £650 plus VAT (£780). However, provided the Wills are essentially identical, we apply a reduction to the second Will and in these circumstances reducing the fee to £550 plus VAT (£660) for both Wills. Should both Wills be fundamentally different, for example involve specific gifts to different beneficiaries or a right of occupation, life interest etc, the fee of £325 plus VAT (£390) per Will applies.

Where you own property, we must obtain a copy of the title, and check the ownership. An additional fee of £50 plus VAT (£60) will be charged.

**Your Details:**

**Identity:** Please could you provide us with your Passport and/or Driving Licence, and Proof of Address (such as a Utility Bill or Bank Statement within the last 3 months).

|  |  |
| --- | --- |
| Full Name: |  |
| Full Address: |  |
| Date of Birth: |  |
| Telephone Numbers: |  |
| E-Mail Address:  |  |
| Please confirm your Marital Status: |  |

**Executors:**

An Executor is the person or persons that will administer your estate and will be personally responsible for doing so correctly. You can appoint up to 4 Executors. Most people appoint 2. It is common for Executors to be members of your family, close friends or your Solicitor.

We recommend that you name at least 2 Executors, and you may wish for one of them to be a substitute in case the first Executor is unable or unwilling to act.

|  |  |  |
| --- | --- | --- |
| Executor Full Name | Executor Full Address | Substitute? |
| 1. |  |  |  |
| 2. |  |  | Yes / No |
| 3. |  |  | Yes / No |
| 4. |  |  | Yes / No |

**Guardians (if applicable):**

These are people who will have actual custody of your children should both their parents die before your children reach the age of 18. The financial arrangements will be in the hands of the Executors unless you appoint special trustees for the children.

If you have children by previous partners then you should consider what will happen to them should their other parent die.

Please provide the full names and addresses of the appointed Guardians:

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**Specific Beneficiaries:**

These are people to whom you would leave specific gifts, such as an item of jewellery, a picture, a car or a house to.

|  |  |
| --- | --- |
| Full Name and Address of Beneficiary | Full description of item (e.g. *Pale Green Vase approx.. 30cm tall with Hand Painted Bluebells*) |
|  |  |

**Pecuniary Beneficiaries:**

These are people to who you wish to leave a specific sum of money to.

|  |  |
| --- | --- |
| Full Name and Address | Amount Left |
|  |  |

**Charitable Gifts:**

If you are leaving money to any charities, then please indicate whether you wish that money to go to a similar Charitable organisation if the one you have left it to. Any gifts to Charity will reduce any Inheritance Tax that may be payable.

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| --- | --- | --- |
| Full Name and Address of Charity | Amount of Gift | Do you wish for this gift to go to a similar organisation if ceases to exist? |
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**Residuary Beneficiaries:**

These are people to whom you wish to leave the balance of your Estate to, after all gifts and debts and taxes have been paid. If the beneficiary dies before you, consider whether you wish for their children to benefit from the gift in their place or not and please indicate this.

|  |  |
| --- | --- |
| Full Name and Address of Beneficiary  | % of Estate  |
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| **Residuary Beneficiary – Substitute** |  |
| You should consider who will benefit from your estate in circumstances where your residuary has died. You should name them below (full name and address): |  |
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**Funeral Wishes:**

If you have any specific requirements regarding your funeral, or if you have a funeral plan in place, then you can either provide details here to be incorporated into your Will, or you can leave a note with your Will with what your wishes for your funeral are. If you do not leave any specific wishes, then your Executors or your Spouse, or those close to you, will be left to arrange the funeral of their accord.

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**Assets and Debts:**

This part of the form is to ensure that we are able to provide you with advice in respect of Inheritance Tax or Estate Planning. If you do not require this, or would prefer not to answer this, then please feel free to leave it unanswered.

Assets:

|  |  |
| --- | --- |
| Asset Description (e.g. *House, Shares, Savings Account*) | Approximate Value |
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Debts:

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| Debt Description  | Approximate Amount Owed |
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Thank you for completing this Form. We will be in touch very shortly.