Will Questionnaire



As part of our wills service we meet with you (our clients) to advise you on your individual circumstances. The following questionnaire helps us put a more detailed picture of you and your circumstances together, so any information you can complete prior to our meeting can save us time when we do get together. If you are coming to us as a couple it is helpful if you can complete a form each.

Personal Information

Your full name (including middle names):

| Any previous surnames: | |
|---|--|
| Your address: | |
| Contact tel no(s): | |
| Email address: | |
| Your date of birth: (DD/MM/YYYY) | |
| Do you need your will prepared urgently for medical reasons: | Yes No No |
| Questions about you | |
| 1: Have you made a Will before? | 3: Continued |
| Yes No No | Full name of child: D.O.B: |
| 1a: Where is that will held? | Address: |
| | |
| 2: Your status, are you: (please tick all that apply) | Full name of child: D.O.B: |
| Married Civil Partnership Single Divorced Living with your partner Separated Engaged Widowed | Address: |
| Spouse name: | 4: Do you have grandchildren? |
| | Yes No No |
| 3: Do you have children and/or stepchildren? | |
| Yes No If you have children under the age of 18, we will discuss guardianship arrangements with you. Please consider who the guardians are to be. | 4a: If any of your children have stepchildren or adopted children that you wish to include please provide details: |
| Full name of child : D.O.B: | |
| Address: | |
| | |
| Full name of child: D.O.B: | |
| Address: | 5: Other than your children, is there anyone financially dependent on you in any way? |
| | Yes No No |

Questions about your estate

Please note that there is no need for you to obtain valuations of any of your assets and liabilities. We just need approximate figures. Should any exact figures be required we will go through this with you at our meeting.

| 6: Do you ow | n a property or properties in the UK? | | | | |
|---|---|---|--|--|--|
| Yes No E | | | | | |
| Please give the addresses of all properties you own unless it is your main residence (Previous page): | | | | | |
| Additional address: | | | | | |
| | Is this property owned jointly? Yes No No If so, please state who the other person is/people are 8 | their share: | | | |
| Additional address: | | | | | |
| | Is this property owned jointly? Yes No In the state who the other person is/people are & their share: | | | | |
| Additional address: | | | | | |
| | Is this property owned jointly? Yes No | | | | |
| | If so, please state who the other person is/people are & their share: | | | | |
| | | | | | |
| 7. The annrox | imate value(s) of any property you own: | g: Do you own property outside the UK? | | | |
| £ | made value(s) or any property you own | Yes No | | | |
| | | If yes, please give the approximate value: | | | |
| 8: If you own mortgages | property, is there a mortgage or outstanding? | £ | | | |
| Yes No C | | Is it owned jointly? Yes No | | | |
| If yes, please sta | ate the approximate amount(s) outstanding: | If so, please state who the other person is/people are & their share: | | | |
| £ | | | | | |
| | | | | | |

Questions about your estate (continued)

| 10. Please state the approximate (i.e. bank accounts, stocks and shares e | value of your other assets: | | | | |
|---|-----------------------------|---------------------|-------------|-----------|-----------------------------|
| | Bank or Society | | Sole | Joint | Your share |
| Sums held in banks or building societies (include ISA accounts) | | | | | £ |
| | | | | | £ |
| | | | | | £ |
| | | | | | |
| | | | | | £ |
| | Stock, shares, trust name | | | | |
| Stocks, shares, unit trusts etc. | | | | | £ |
| | | | | | £ |
| | | | | | £ |
| | | | | | |
| | | | | | £ |
| Bonds | | | | | £ |
| | | | | | £ |
| | | | | | |
| National Savings | | | | | £ |
| J | | | | | £ |
| | | | | | |
| Other | | | | | |
| Other | | | | | £ |
| | | | | | £ |
| | | | | | |
| 11: Do you have a pension plan(s)? | | | ct to be | a bene | ficiary in a Will or Trust? |
| Yes No | | Yes No | | | |
| 12: Do you have life insurance? | | 13a: Do you cur | rently b | enefit fi | rom a trust fund? |
| Yes No Amount of cover £ | | Yes No No | | | |
| Is this: Death in service Separate policy | | Please provide brie | ef details: | | |
| South in sorvice separate policy _ | | | | | |
| | | | | | |



Questions about your estate (continued)

| 14: Have you made a gift of cash or assets over £3,000 per tax year in the last 7 years? (No need for gifts under £3000. | | 15: Businesses | | | |
|--|-------|---|-----|----|---|
| Please note: If you have made gifts into trust we consider earlier gifts) | | Do you own a business? | Yes | No | |
| Please give details: Recipient | Value | If yes, do you own it solely or with another person? | Yes | No | |
| · | £ | If you own with another person, do you have a shareholder agreement in place? | Yes | No | |
| | £ | Do you require a Business Power of Attorney to allow your attorney to take | Yes | No |] |
| | £ | business decisions for you in your absence? | | | |
| Have you made any cash gifts since 1986 where you the asset given away (as there may be tax implicatio | | Please confirm the nature of the business | | | |
| Yes No No | | | | | |

Questions about your intentions in your Will

Most couples want to benefit each other when they die. If you die first, this can mean that sometimes your assets don't pass to your children (or any other chosen beneficiaries). E.g. If the surviving partner remarries, has a live-in partner or goes into care. We can discuss your options to allow your partner to benefit during the rest of their life, but ultimately benefit your children or chosen beneficiaries. We will talk to you about your options at our meeting but it is helpful if you could let us know what your current intentions are.

| 1: Do you want to leave any cash legacies to anyone? |
|--|
| |
| Yes No No |
| If yes, to whom: |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

Questions about your intentions in your Will (continued)

| 2: Do you want to leave any specific items to anyone? Yes No | 7: If a disaster scenario occurred and you had no beneficiaries remaining i.e. all had died together, who would you like to inherit: |
|---|--|
| If yes, please give details: | |
| | |
| | 8: Would you like to be buried or cremated? |
| | Buried Cremated |
| | Do you have any special wishes for your remains? |
| | |
| 3. Are any of your beneficiaries vulnerable or do they give you cause for concern? | Do you have a funeral plan? |
| Name: | Yes No No |
| | If Yes, please give details: |
| Reasons for concern: | Funeral company: |
| | Reference: |
| | You may wish to prepare a separate note with full details of your wishes for your funeral for passing to your family and executors. |
| | 9: Who would you like to be your Executors, i.e. |
| 4: If you are married or in a civil partnership, do you want your spouse/civil partner to inherit your entire estate on your death? | the persons with the authority to carry out your instructions after you die? Full Name: |
| Yes No No | Address: |
| 5: If your spouse/civil partner dies before you, | |
| do you want your children to inherit your entire estate equally between them? | Full Name: |
| Yes No No | Address: |
| If yes, if any of your children die before you leaving children of their own, i.e. your grandchildren, would you want their children to inherit | |
| their share equally between them? | 10. Are you interested in making a lasting power of attorney? |
| Yes No No | Yes No No |
| 6: At what age would you like your beneficiaries to inherit? | If you have an existing power of attorney we would be happy |
| 18 21 25 Other | to review this. |

| Additional Notes: |
|-------------------|
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

| Additional Notes: |
|-------------------|
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |





V Expert.V Trustworthy.V Approachable.

Luton office: 01582 725311 Harpenden office: 01582 715234 Milton Keynes office: 01908 304560

For more information visit: www.nevesllp.co.uk