

The questionnaire is ideal for simple will instructions and may mean we can prepare your will and then arrange for signature. In more complex circumstances, completion of the questionnaire will assist us - so please feel free to fill in the information.

**\* indicates not compulsory**

<b>Your Details</b>
Your full name:
Correspondence Address:
Date of Birth:
Country of Birth:
Nationality:
Contact Telephone Number: 1)
2)
Email Address:
Employment Status: Employed/Self-Employed/Retired/Carer/Other (please circle)
<b>Marital Status</b>
Single <input type="checkbox"/>
Married <input type="checkbox"/>
Civil Partnership <input type="checkbox"/>
Cohabiting <input type="checkbox"/>
Widowed <input type="checkbox"/>
Divorced <input type="checkbox"/>
Separated <input type="checkbox"/>
Have you been married before? Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you intending to be married? Yes <input type="checkbox"/> No <input type="checkbox"/>

<b>Your Partner's Details</b>
Your full name:
Correspondence Address:
Date of Birth:
Country of Birth:
Nationality:
Contact Telephone Number: 1)
2)
Email Address:
Employment Status: Employed/Self-Employed/Retired/Carer/Other (please circle)
<b>Marital Status</b>
Single <input type="checkbox"/>
Married <input type="checkbox"/>
Civil Partnership <input type="checkbox"/>
Cohabiting <input type="checkbox"/>
Widowed <input type="checkbox"/>
Divorced <input type="checkbox"/>
Separated <input type="checkbox"/>
Have you been married before? Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you intending to be married? Yes <input type="checkbox"/> No <input type="checkbox"/>

Your Children	
Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address:	Address:
Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address:	Address:

Your Partner's Children	
Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address:	Address:
Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address:	Address:

Do you have any grandchildren?	Yes <input type="checkbox"/> No <input type="checkbox"/>
--------------------------------	--

Guardians for your children
(Guardians live with the children and look after their physical and mental needs)
If you have children under the age of 18, guardians should be considered. You should discuss this with your partner. Check first that your guardians are happy to act.
<b>Guardian 1</b>
Full Name:
Address:
Relationship to you (i.e. friend, brother?):
<b>Substitute Guardian</b> (if considered necessary)
Full Name:
Address:
Relationship to you (i.e. friend, brother?):



Contd...

If No, please state who you wish to inherit your estate (including full names & addresses & indication if under 18 years), e.g. % to x, % to y

(Please note, beneficiaries will inherit at 18 years of age unless you state otherwise)

#### Legacies

These are generally gifts of specific items (e.g. jewellery) or sums of money, please list items below:

e.g. name & address	<input type="checkbox"/> legacy
John Smith of Brooklea Cottage, Rampart Lane, Hamley. (indicate if under 18)	<input checked="" type="checkbox"/> my stamp collection and watch
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

(Please tick the box if the gifts are only to be made when **both** you and your partner have died)

#### Your funeral wishes \*

Would you prefer to be cremated or buried?

Do you have any specific requests in relation to cremation or burial?

### Your Assets

It would be helpful for inheritance tax purposes to have an approx. guide as to the value of your assets. This section is not compulsory.

<b>Your Property *</b>			
	Owned just by you	Owned by your partner	Owned Jointly
	Approximate Values £	Approximate Values £	Approximate Values £
Main residence (give address here if different from correspondence address)			
Other houses or land owned in the UK			
Business or agricultural assets (e.g. Company shares, a farm, partnership interest)			
<b>Your Money *</b>			
	Owned just by you	Owned by your partner	Owned Jointly
	Approximate Values £	Approximate Values £	Approximate Values £
Cash Assets (e.g. Bank & Building Society accounts, Savings)			
Investments (e.g. ISAs, PEPs, Premium Bonds, Stocks and Shares)			
Other items, not listed above (e.g. jewellery, cars, art)			
Life Insurance/ Pensions			
<b>Your Liabilities *</b>			
	Owned just by you	Owned by your partner	Owned Jointly
	Approximate Values £	Approximate Values £	Approximate Values £
Outstanding Mortgages and name of lender			
Other debt including loans & credit cards			
<b>Total of all above liabilities</b>			
<b>Total of all assets listed above</b>			

Lifetime Gifts *	
Have you made any lifetime gifts within the last 7 years? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Amount of Gift	Name of person who received gift
£	
£	
£	
£	
Miscellaneous	
If you tick any of the following boxes could you please bring details with you when attending our offices as these may require specific advice:	
Do you have any overseas assets (e.g. property)?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wish to leave any money or assets in trust?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you included any beneficiaries with learning disabilities?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you wish to know about Lasting Powers of Attorney? (These can help you and your family if you lose mental capacity)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any entitlement to death in service benefits or pension benefits on death?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Inheritance Tax
Inheritance tax is the tax on your assets when you die. This is calculated by considering the assets, which you owned at the time of your death less any liabilities (i.e. gas bills, income tax etc).
There are rules as to whether the value of lifetime gifts are taken into account. If you have made lifetime gifts please contact us. Lifetime gifts made within 7 years of death (there are exceptions such as, small gifts of £250, annual gifts of up to £3,000) will be taken into account.
Most gifts between husband and wife are <b>exempt</b> from inheritance tax.
Inheritance Tax is charged at nil percent on the first £312,000 of a person's estate. Thereafter it is charged at 40 %

Tax Planning
Without proper tax planning, many people can end up leaving a substantial tax liability on their death, considerably reducing the value of the estate passing to chosen beneficiaries.
Do you wish to receive tax planning advice? Yes <input type="checkbox"/> No <input type="checkbox"/>

