



WILL QUESTIONNAIRE

This questionnaire will provide us with most of the information required to draft your Will. It will also establish any inheritance tax issues and special needs you may have. This is not a legal document, but is intended as a basis for future discussion. If there is insufficient space on this form, please use a separate sheet of paper.

PERSONAL DETAILS

YOU

Full Name:

Any other name(s) in which you have assets:

Address:

Date of Birth

Country of Birth:

Telephone numbers: Home
Work
Mobile

E-mail:

SPOUSE, CIVIL PARTNER OR PARTNER (If applicable)

Full Name:

Any other name(s) in which you have assets:

Address:

Date of Birth

Country of Birth:

Telephone numbers: Home
Work
Mobile

Do you have a spouse or partner, with whom you live?

YES/NO

Are you married or in a civil partnership?

YES/NO

If no, do you intend on marrying or entering into a civil partnership in the near future?

YES/NO

DETAILS OF ANY CHILDREN (including those of any spouse/partner)

<u>Full Names of Children</u>	<u>Address(es) if different from your own</u>	<u>Ages</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

DEPENDANTS (including those of any spouse/partner)

The law enables certain persons to apply to the Court for reasonable financial provision from a deceased persons estate. You should consider any potential claims when you make your Will. Please provide information regarding any person(s) in the following categories:-

- 1 Your (or your partner's) former spouse / civil partner who has not remarried;
 - 2 Your (or your partner's) spouse / civil partner if you are separated or divorcing;
 - 3 Any person maintained by you (or your partner).
- There is no need to include children whose details are recorded in the previous section.

DETAILS OF ASSETS & LIABILITIES

ASSETS	Name	Name	Joint Names
Freehold/Leasehold Property	£ _____	£ _____	£ _____
Bank/Building Society Accounts	£ _____	£ _____	£ _____
National Savings	£ _____	£ _____	£ _____
Quoted Stocks, Shares Unit Trusts	£ _____	£ _____	£ _____
Unquoted Stocks & Shares	£ _____	£ _____	£ _____
PEPS and ISA'S	£ _____	£ _____	
Household & Personal Effects (Market value - not insurance value)	£ _____	£ _____	£ _____
Death in Service Benefit from Employer	£ _____	£ _____	£ _____
Life Assurance	£ _____	£ _____	£ _____
Foreign Assets	£ _____	£ _____	£ _____
Loans repayable to you	£ _____	£ _____	£ _____
Business Interests (sole trader)	£ _____	£ _____	£ _____
Partnership Interests	£ _____	£ _____	£ _____
Agricultural Property	£ _____	£ _____	£ _____
Other Assets	£ _____	£ _____	£ _____
TOTAL ASSETS	(A) £ _____	£ _____	£ _____

LIABILITIES

Mortgages	£ _____	£ _____	£ _____
Other Loans & Debts	£ _____	£ _____	£ _____
TOTAL LIABILITIES	(B) £ _____	£ _____	£ _____

NET VALUE = (A) less (B) £ _____ £ _____ £ _____

WILL INSTRUCTIONS

FUNERAL WISHES*Please tick appropriate box*

YOU	Buried <input type="checkbox"/>	SPOUSE OR PARTNER (If applicable)	Buried <input type="checkbox"/>
	Cremated <input type="checkbox"/>		Cremated <input type="checkbox"/>

EXECUTORS

Your executors will be responsible for administering your estate, and will usually act as trustees of any part of your estate which is held in trust for beneficiaries. Possible choices include adult family members, friends, beneficiaries or professionals. If you wish, the Members of Griffith Smith Farrington Webb LLP can be appointed to act alone or jointly with any other person(s).

It is generally advisable to appoint two executors with one substitute if either of your first-choice executors is unable to act. If you appoint the Members of Griffith Smith Farrington Webb LLP, then a substitute will not be necessary.

First Choice of Executor(s)

<i>Full Name(s)</i>	<i>Address(es)</i>
1 _____	_____
2 _____	_____

Any Substitute Executor(s)

<i>Full Name(s)</i>	<i>Address(es)</i>
1 _____	_____
2 _____	_____

GUARDIANS

If you have any children under the age of 18, it is important to consider who will care for them if you and their other parent die whilst they are still under age.

You can appoint a guardian in your Will who will have legal responsibility to care for your children in this event. If you were not married to the child's other parent, then different rule may apply, and we will discuss this with you further.

<i>Guardian's Full Name(s)</i>	<i>Address(es)</i>	<i>Relationship (if any)</i>
_____	_____	_____
_____	_____	_____

SPECIFIC GIFTS OF CASH OR PERSONAL BELONGINGS

If you wish to make any gifts before the main part of your estate is distributed, please list full details.

<i>Beneficiary's full names & addresses</i>	<i>Relationship to you (if any)</i>	<i>Amount in £'s or description of item</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

In the case of Wills for couples, please tick one box below to indicate whether cash legacies are to be paid under each Will, or once only on the first or second death.

Cash Legacies to be paid under both Wills

Cash Legacies to be paid on first death only

Cash Legacies to be paid on second death only

