

CONFIDENTIAL WILLS QUESTIONNAIRE

Please complete this form in order to assist us in giving you the right advice and to ensure that all relevant matters are considered before your Will is drafted.

SECTION 1 : PERSONAL DETAILS

Mr / Mrs / Miss / Ms/ OtherSurname

First Names in Full

Former Names (if any)

Full Address

.....

Home Telephone NumberWork Telephone Number

Email

Occupation

Date and Place of Birth

Marital Status : Single / Civil Partnership/Married/ Divorced / Separated /
Living Together / Widowed

If civil partner/married; Date and place of ceremony

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Children : Full names and, if under 18, dates of birth
(please specify if step-children)

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.....

.....

Do you have an existing Will?

If so, where is the original kept?

SECTION 2 : DETAILS OF YOUR CIVIL PARTNER/ SPOUSE/PARTNER

Mr / Mrs / Miss / Other

Surname

First Names in Full

Maiden name if applicable

Full Address (if different from your own)

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Occupation Date of Birth

Is a Will corresponding to your own also to be prepared by your partner?

Do they have an existing Will?

If so, where is the original kept?

SECTION 3 : CIVIL PARTNERSHIP or PROVISION FOR DEPENDENTS AND FORMER PARTNERS

A. Are you intending to get become a Civil Partner in the near future?.....

If so, is the Will to take effect immediately and continue after the civil ceremony ?

.....

Is the Will only to be effective after the civil ceremony has taken place ?

.....

B. The law gives rights to people who are financially dependent upon you. If you do not make provision for them they may be able to claim against your estate. These people are your civil partner/spouse, a former civil partner/spouse who has not remarried, your partner, your children or those of your partner who you have treated as your own, and anyone else who is financially dependent upon you.

In order for us to advise you properly, please state here the names and relationship of any of the above (in particular dependants) you do not intend to benefit under your Will.

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SECTION 4 : EXECUTORS

Your Executors (or Trustees) are the people who have the responsibility of gathering in your estate and ensuring that your wishes are carried out. It is best to appoint two Executors and a good idea to ensure that at least one of them is an impartial and independent professional; there is no extra charge if you wish to appoint Foot Anstey. Please indicate your choices of Executor by ticking against the following options:-

	As First Executor(s)	As Substitute Executor(s) if first Executor(s) cannot act
A. My partner		
B. Foot Anstey		
C. Person(s) named below		

Please complete details of other Executors referred to above (i.e. named Executors who are not your partner or Foot Anstey) :-

1. Full name
- Full address
- Relationship
2. Full name
- Full address
- Relationship

SECTION 5 : GUARDIANS

If you have children under 18 then it is wise for you to appoint guardians to have responsibility for them and direct their education if you are not able to. If you are in a Civil Partnership your surviving Partner will automatically have parental responsibility for any children you have had together, however you may wish to consider who would look after your children if something happened to you both. If you are not Civil Partners then in some circumstances your partner may not automatically have parental responsibility and so it will be necessary for your partner to be specifically appointed as guardian.

Please write the guardians' names below.

Full name of Guardian(s)

Address of Guardian(s)

.....

Relationship to you (if any)

SECTION 6 : THE VALUE OF YOUR ESTATE

It helps us in advising you to have an idea of the size of your estate. Please complete the following as best you can, but precise balances and account numbers are not necessary. Please state if any assets are owned jointly with someone else.

Any information you give us will of course be kept completely confidential

Do you own your own house?

If so, is it in joint or single names?

Approximate value of your homeMortgage?

Total value of any stocks and shares?

Do you have any life assurance policies ? If so, please give brief details and approximate values.

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Do you have a Pension Scheme?

Do you own any property abroad?

Do you own your own business or are you a partner of a firm?.....

If so please give details.....

.....

Please provide brief details and approximate values of the rest of your assets, (eg, Bank and Building Society accounts and other investments) – use another sheet of paper is necessary

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In order for us to advise you as to your inheritance tax position please indicate by ticking the appropriate box below the value of your assets less your liabilities.

Amount	In your Name	In Partners Name	In Joint Names
UP to £100,000.00			
£100, 000.00 to £300,000.00			
Above £300,000.00			

Have you made any substantial gifts (over £3,000) of money or property to any individuals in the last seven years?

If so, please provide brief details as they may affect your tax position

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Do you benefit, or will you benefit in future, from any Trust Fund?

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SECTION 7 : LEGACIES

Please give details of any specific gifts, either of a fixed sum of money or a particular item, you wish to make under your Will. (Use a separate sheet of paper if necessary).

Please write the beneficiaries' full names and addresses and give details of each cash sum or a clear description of each specific item that you wish to leave them.

If you wish to leave your whole estate to one or more people please go direct to Section 8

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If a beneficiary dies before you then the gift that you have made to them will become part of the "Residue" (please see section 8) and will go to the people you will name in Section 8 to receive the Residue of your estate.

Do you wish to nominate a replacement beneficiary for any of the gifts you have listed above?.....

If so, please give their details and say which of the gifts they are to receive.

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If you wish to leave any gifts to charity then please include them above

SECTION 8 : WHO IS TO RECEIVE THE "RESIDUE" OF YOUR ESTATE ?

The Residue of your estate means whatever is left once all taxes, bills and legacies have been paid.

(a) Main Beneficiary

Please set out below the person or persons you wish to leave the Residue to, and the proportion they are to receive. If there is not enough space, please continue on a separate sheet of paper.

Beneficiary 1:

Proportion

Relationship to you.....

Beneficiary 2:

Proportion

Relationship to you

Beneficiary 3:

Proportion

Relationship to you

Beneficiary 4:

Proportion

Relationship to you

(b) Substitute Beneficiaries

Should the main beneficiary or beneficiaries named above die before you or fail to survive you for 30 days (to cover the possibility of a joint accident), please indicate by ticking the appropriate option below what should happen to that beneficiary's share :

- A. divide it equally between that beneficiary's children, if any, that survive me
- B. add the share to the shares of the other beneficiaries set out in Section 8 (a) in the same proportions
- C. if you have other wishes please set out below in your own words the alternative people you would wish to benefit and the proportion they are to receive (please state their full names and relationship to you)

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If any of the beneficiaries' you have mentioned are children, please state their ages.

Usually, payment would be made to children when they reach 18 years. if you wish them to receive their share later (usually 21 or 25 years) then please indicate what age. For taxation reasons we do not recommend an age greater than 25.

SECTION 9 : MISCELLANEOUS

You may have specific instructions with regard to your funeral?

Cremation Burial

If you have special instructions please write them here

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Do you suffer from any disability which might affect your ability to sign the Will?.....

Are any of the beneficiaries mentioned in the Will themselves physically or mentally disabled?

If so please give details:

.....
.....

PLEASE SIGN :

I understand that my answers to the above questions form the basis of my instructions to Foot Anstey for them to prepare a Will on my behalf.

Signed

Dated