



## **WILL QUESTIONNAIRE**

It would be helpful to us, when assisting you in the making of your Will, if you could supply the following information. Replies will, of course, be treated as strictly confidential. Thank you.

	<b>Your Details</b>	<b>Your Spouse/Partner's Details</b>
Surname:		
Forenames:		
Title: (Mr/Mrs/Miss/Dr)		
Marital status: (married/ single/divorced/widowed)		
Date of birth:		
Occupation:		
Address:		
Telephone number:		
Relationship to you of spouse		(wife / husband/ partner)

**Appointment of Executors**

1) If you are leaving your Estate to your spouse/partner on the first of your deaths, are they to be appointed as sole Executor?

YES / NO

2) Please name the Executors who will act if 1) above does not apply or your spouse/partner does not survive you. You may choose up to four people.

Surname:	Forenames:
Address:	
Surname:	Forenames:
Address:	
Surname:	Forenames:
Address:	
Surname:	Forenames:
Address:	

## **Beneficiaries**

### Gifts of specific items and/or money:

Please give details of the gift together with the full name and address of the beneficiary. If the beneficiary is under the age of 18, give their age. If the beneficiary is a registered charity, please give the registered charity number.

Gift	Beneficiary - Name and address

If you are unsure as to what items to leave to relatives or friends or would like to have some flexibility about gifting such items, you might like to include a separate list (sometimes called a Letter of Wishes). The list will be kept with your Will and advise your Executor(s) of your instructions. The list will be mentioned in your Will but you can update the list from time to time without having to change your Will.

## **The Residue**

The residue of your Estate is everything that is left after any gifts made under the heading above. Who will receive the residue?

Name	Name and address (age if under 18)


### **Guardians**

If you have children under the age of 18 years, you should consider appointing guardians to look after your children if you and your spouse/partner die.

Surname:	Forenames:
Address:	

Surname:	Forenames:
Address:	

### **Funeral Arrangements**

Do you have any specific instructions for your funeral? You do not have to mention this in your Will if you do not wish to.

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<b>Please can you also answer the following questions:</b>	<b>You</b>	<b>Your spouse/ partner</b>
Do you or your spouse/partner already have a Will?	YES / NO	
At what age would you like any children to be entitled to receive any benefit under your Will?	State age	
Would you like to discuss inheritance tax planning?	YES / NO	
Do you have property/investments abroad?	YES / NO	
Do you own any business interests?	YES / NO	