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WILL QUESTIONNAIRE

INTRODUCTION

This document is intended to help you decide what you want to include in your Will. Some parts may not be relevant to you - leave a blank if there is any question that does not apply. We will discuss everything with you fully before preparing your Will.

1. PERSONAL DETAILS

	Yourself	Your spouse/civil partner/partner
Full name		
Address (including postcode)		
Telephone number(s)		
Email address		
Date & country of birth		
Occupation		
Any previous names/maiden names		

2. FAMILY

Children (including children from a previous marriage/civil partnership/relationship):

Name	Date of birth	Marital Status	Address (if different from yours)

Grandchildren

Name	Date of birth	Marital Status	Address

Other financial dependants (others who may be expected or who expect to benefit from you):

Name	Date of birth	Marital status	Address

3. MARRIAGE / CIVIL PARTNERSHIP / PARTNERSHIP DETAILS

Year of marriage or registration of civil partnership	
Please indicate if you are not married to or in a registered civil partnership with your partner	
Please indicate if you are intending to marry, re-marry or register a civil partnership in the near future	
Have either of you been married or in a registered civil partnership before?	

4. ASSETS & LIABILITIES

Please provide brief details in left hand column and approximate value in right hand column:

£

<ul style="list-style-type: none"> • Main residence Is it freehold or leasehold? (<i>Please circle</i>) Is it held as joint tenants or tenants in common? (<i>Please circle or leave blank if you don't know</i>) • Second property If it is abroad, in which country is it located? 	
<ul style="list-style-type: none"> • Stock Exchange securities 	
<ul style="list-style-type: none"> • Private company shares 	
<ul style="list-style-type: none"> • Business and partnership interests 	
<ul style="list-style-type: none"> • Bank accounts 	

<ul style="list-style-type: none"> • Building Society accounts 	
<ul style="list-style-type: none"> • Other cash assets e.g. loans due, National Savings Certificates 	
<ul style="list-style-type: none"> • Personal chattels e.g. furniture, cars, works of art, jewellery 	
<ul style="list-style-type: none"> • Assets held outside the UK 	
<ul style="list-style-type: none"> • Trust interests (give details of capital value) 	
<ul style="list-style-type: none"> • Life policies Are they already written in trust? (<i>Please circle</i>) Yes/No To whom will the proceeds be paid? 	
<ul style="list-style-type: none"> • Liabilities (a) Mortgage (b) Other debts due 	

5. INCOME

£

Current annual earned income	
Current annual investment income	

6. PENSION

£

Details of any pension arrangements:	
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7. **LIFETIME GIFTS** (details of any substantial gifts you have made during the last 7 years):

£

To whom was the gift made:	
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8. **DETAILS FOR YOUR WILL**

<p>Do you wish to include burial/cremation instructions? (Please circle) Yes/No</p> <p>Details of your instructions:</p>
<p>Who do you want to act as executors? <i>The executors deal with your assets after your death. Normally it is sensible to appoint 2 or 3 people to act as your executors (maximum of 4). They must be aged 18 years or over. Family members and the survivor of you can act as executors or you can appoint professional executors (who will normally wish to charge for their services).</i></p> <p>Full name(s) & address(es) of your executors:</p>
<p>Do you want to appoint guardians? (Please circle) Yes/No <i>If you have children under 18, it is sensible to appoint guardians to look after them if your spouse/civil partner/partner predeceases you or if there is a joint accident. The guardians can be family members or friends.</i></p> <p>Full name(s) & address(es) of your guardian(s):</p>

Do you want to include any gifts/legacies? (Please circle) Yes/No

You can give cash amounts or specific items and they will normally be tax free, unless you provide otherwise in your Will. Any specific items must be adequately described to avoid confusion.

Please put a tick next to the name if any gift or legacy is to go to a child (under 18)

Details of gifts/legacies to include in your Will (including any cash amounts to charity):

How do you wish to deal with any private company shares you own at the date of your death?

Do you want to leave them all to the same person (consider whether it is appropriate for one beneficiary to receive the entire shareholding if, for example, you own a controlling holding) or would you prefer the shares to be sold, and the proceeds given to your beneficiaries?

Instructions as to how you wish to deal with your private company shares:

How do you want to deal with the rest of your assets, i.e. after the discharge of your debts, funeral expenses and taxes (if any) and the payment of any gifts/legacies?

You can give everything to the survivor of you (absolutely or in trust), but you also need to consider what happens if your spouse/civil partner/partner predeceases you. Would you want your assets to be split between your children in equal shares? If something were to happen to one of your children, would you want his/her share to go to his/her own children?

It is sensible also to have a long-stop beneficiary, perhaps a charity, friend or remoter relation, in the unlikely event that you and your immediate family should perish in a single accident.

You also need to decide how old you would want your children/grandchildren to be before they inherit. If you make them wait beyond age 18, there can be additional tax charges that we will be happy to explain to you.

Details of how to divide your estate:

Signed:

Date:

Please return this questionnaire to **Julie West Solicitor**, at the **address on the cover sheet**, and feel free to include additional pages or separate lists of assets (if appropriate/more convenient).

It would be useful if you would also provide copies of the following documents (where relevant):

- any existing Will and Codicil(s);
- any insurance policies or pensions which provide benefits on your death;
- any trust deeds of which you are a settlor or a beneficiary; and
- any other documents relating to assets over which you have a power of appointment.

Thank you.