



alsters kelley
solicitors

WILL QUESTIONNAIRE

Please complete as much of this questionnaire as possible prior to your appointment to see us.
The questionnaire will ask you for details which we need to know in order to prepare your Will

(1) About You

Full Name _____
Please state any other name by which you are known

Address _____

Postcode _____

Telephone Number _____

Marital Status _____

Date of birth _____

Nationality/Country of Residence _____

Occupation _____

(2) About your Husband/Wife/Partner*
**Please delete as appropriate*

Full Name _____

Address (if different from above) _____

Date of birth _____

Nationality/Country of Residence _____

Occupation _____

Year of Marriage _____

Have you been married previously _____

(3) About your children
Please give details below

Child 1
Name _____

Address _____

Date of birth _____

(3) About your children (continued)

Child 2
Name _____

Address _____

Date of birth _____

Child 3
Name _____

Address _____

Date of birth _____

Child 4
Name _____

Address _____

Date of birth _____

Do any of the following apply to the above named children
(please tick as appropriate)

Born outside of marriage

Adopted

Step child

Mentally impaired in any way

If any of the above apply please give details below

(4) About any existing Will

Do you have an existing Will _____

If so, where is it lodged _____

(5) About your Financial Circumstances

(i) Your Assets

Where any of the following apply to you, please indicate the approximate value of your interest/share and also indicate whether the property is held jointly with another person

	Details	Value	Held Jointly?
Home			
Other Land/Buildings			
Personal Possessions/Car			
Bank Account(s)/ Building Society Account(s)			
Business/Agricultural Property			
Quoted shares/ Unquoted shares Unit Trusts/ Investment Trusts/ PEP's			
Insurance Policies			
Pensions (private plans/ occupational pensions)			
Interest under a Trust			
Property outside UK			
Other			
TOTAL			

(ii) Your Debts

Where any of the following apply to you, please indicate the approximate value of the outstanding liability and also indicate whether another person is jointly liable for the debt

	Details	Value	Joint Responsibility
Mortgage			
Bank Overdraft			
Other			
TOTAL			

(6) About Your New Will

Funeral Directions

You may choose to specify your wishes about burial, cremation, donation of your body for medical research purposes and your choice of funeral service.

Please give details below _____

Execution of your Will

You must appoint Executors to administer your estate after your death in accordance with the terms of your Will. It is wise to appoint at least two Executors, particularly if young children may benefit under your Will. You should note that a husband and wife can appoint each other to act as Executors. Your Executors are extremely important; their duties will be to collect in all the assets of your estate after your death, pay any outstanding liabilities, eg mortgages and then distribute the "residuary estate" ie what is left in accordance with the terms of your Will.

Please list below up to four chosen Executors

1. Name _____

Address _____

2. Name _____

Address _____

3. Name _____

Address _____

4. Name _____

Address _____

Guardians for your Children

If you have children under the age of 18, you may want to appoint one or two people to act as their legal guardians until they reach the age of 18. The appointment of a guardian will usually only take effect on the death of the last surviving parent of the child, although this situation may be different if you are a single parent/the mother and father have never been married

Guardians for your Children (continued)

You should discuss your choice of guardian with your Solicitor at your appointment. You should also ensure that you have discussed your intended wishes with the person you wish to appoint to act as guardian as legal guardianship does involve taking on a lot of responsibility.

Name _____

Address _____

Name _____

Address _____

• Distribution of your Estate

(i) Legacies

These may be either cash gifts (eg I give the sum of £100.00 to my friend Mr Smith ...) or specific gifts of certain articles which you own (eg I give all my jewellery to my daughter ...). You do not have to make any of these gifts and if you do not specifically dispose of your money or personal belongings it will form part of the general "residue" of your estate to be divided in accordance with your wishes.

REMEMBER

- **Cash Gifts** - you should bear in mind the value of the legacy in relation to the financial size of your estate; try to ensure that payment of the legacy will not deprive the residuary beneficiaries of your estate whom you may wish to benefit from the largest part of your estate.

- **Specific gifts** - if you choose to make a gift of your china collection to a certain beneficiary, and then subsequently dispose of that collection during your lifetime, the gift will of course fail. There can be no substitution by way of cash from the estate for the disappointed beneficiary.

Please set out the legacies you wish to make below:

Name _____

Address _____

Gift/Share _____

Name _____

Address _____

Gift/Share _____

Distribution of your Estate (continued)

(ii) Disposal of Residue

Please indicate the appropriate option below:

- everything to my spouse, but if he/she does not survive me then for all to my children equally at age ____ (or grandchildren if applicable)

NB: if any child has received a substantial sum from you is this to be brought into account at the time the estate is divided?

OR

- everything to _____

but if he/she does not survive me then for the following (please state in what shares):

(iii) "Longstop" Provisions

It is always advisable to consider the perhaps unlikely event that none of the people (or charities/institutions) mentioned in (ii) above are alive or capable of benefiting from your Will. In such a situation, who would you choose as your "longstop" beneficiary(ies)

(iv) None of the above

If none of the aforementioned seem appropriate for you, please set out your requirements below (or use a separate sheet of paper if necessary)

Tax Points to consider

It may be that the value of your estate (or the estate of your spouse and yourself when combined) exceeds the nil rate band threshold for Inheritance Tax. Currently, on the first £325,000 of a person's estate, tax is charged at the rate of 40% on their death on everything over and above the nil rate band threshold. Married couples may have up to double the value of this relief depending on certain circumstances. Certain reliefs and exemptions are available including the following:

- spouse exemption in respect of gifts been husband/wife on death 100% exempt
- gifts to charities 100% exempt
- business relief in respect of certain qualifying businesses 50/100% relief
- agricultural relief 50/100% relief

It may be that this will not apply to you. However, you may like to discuss some of the above points and other ways to achieve effective lifetime tax planning to minimise the cost of tax in the long run.

Please tick this box if you feel you may want to discuss the above with your Solicitor at your appointment. []

(7) Possible claims on estate

Is there anyone for whom you have accepted financial responsibility, eg by maintenance payments or other support?

(8) Other relevant information

(i) Pension Benefits

These may not form part of your estate

- To whom are death benefits actually payable?

- Where possible, have you completed a Declaration of Trust or a Statement of Wishes?

