

YOUR WILL CLIENT QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of our firm, and your appointment if made, are set out below.

KAG/web

PART A – You and Your Family

1. YOUR DETAILS

Forenames
Surname
Address :
.....
.....Postcode
Telephone number
Date of Birth
Occupation



Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

.....
.....
.....
.....



2. YOUR HUSBAND/WIFE/PARTNER

Forenames
Surname
Date of Birth
Occupation

3. MARRIAGE/PARTNERSHIP DETAILS

- (a) Year of Marriage
- (b) Please tick this box if you are not married to your partner
- (c) Please tick this box if you are intending to marry/re-marry in the near future
- (d) Has either of you been married before? YES NO
- (e) Date of previous marriage
- (f) Name of former spouse:
- (g) Date of divorce
- (h) Court where decree absolute pronounced
- (i) Financial arrangements eg clean break



4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP) – full names, dates of birth, and address if different from yours

(a) Name.....
Date of Birth
Address
.....
(b) Name.....
Date of Birth
Address
.....
(c) Name.....
Date of Birth
Address
.....
(d) Name.....
Date of Birth
Address
.....

5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER'S PREVIOUS MARRIAGES OR RELATIONSHIPS – full names, dates of birth and address if different from yours

(a) Name

Date of Birth

Address

.....

.....

(b) Name

Date of Birth

Address

.....

.....

(c) Name.....

Date of Birth

Address

.....

.....

Please note :
 * Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
 * Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

PART B – YOUR HOME AND OTHER ASSETS

6. YOUR HOME – is your home :

(a) Owned :

(i) in your name alone? Yes No

(ii) in joint names with your husband/wife/partner? Yes No

(iii) in the name of your husband/ wife/partner alone? Yes No

(b) Rented? Yes No

(c) Other – e.g. provided by a relative? Yes No

7. If your answer was (c) please give more details :

.....

.....

.....

.....

.....

8. DO YOU HAVE A BUSINESS? Yes No

If yes :- state type of business

.....

.....

Is it a (tick box) :

Company Partnership In your sole name

9. YOUR MAIN ASSETS

Please list your other main assets below and give approximate values :-

.....

.....

.....

10. JOINT ASSETS

Do you have any jointly owned assets? If yes, please give a general description, and their approximately values, and the name(s) of the other owner(s).

.....

.....

.....

Please note : Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will.

11. DO YOU OWN ANY ASSETS ABROAD?

If yes, please give details :-

.....

.....

.....

PART C – FUNERAL , EXECUTORS, GUARDIANS

12. FUNERAL

You may specify in your Will if you wish to be :-

Buried Cremated No Preference

Please Note :

* You should make these wishes known to your immediate family as well and not rely on what is in your Will.

* If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card.

13. EXECUTORS

In general terms the duties of the Executors are to collect in the assets of the deceased, pay their debts including funeral and administration expenses out of their assets and distribute the net estate in accordance with the terms of the Will. We recommend that you appoint at least two Executors to guard against the possibility that one may die before you. An Executor will ensure that the wishes outlined in your Will are carried out. It is usual for your spouse or next of kin (who is usually the main beneficiary) to be appointed as the first Executor. The remaining Executors can if you wish be your professional adviser ie your Solicitor. In that regard partners of Beecham Peacock would be willing to act as Executors. Before appointing an Executor you may like to discuss the matter with the person or persons involved to ensure that they are willing to be named as an Executor in your Will. If you appoint someone other than a Solicitor and they refuse to carry out the duties after your death then problems could arise. If any of the gifts in your Will are for your spouse for life or are going to be held on a continuing trust for a beneficiary all group of beneficiaries eg young children or grandchildren until they reach 18, 21 or 25 your Executors then become Trustees of the continuing Trusts.

List below up to four chosen executors.

(a) Name

Address

.....

(b) Name

Address

.....

(c) Name

Address

.....

(d) Name

Address

.....

Would you like partners from our firm to act as your executor(s)? Yes No

14. GUARDIANS.

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will only usually apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name

Address

.....

(b) Name

Address

.....

PART D – Have you appointed to act as your Attorney in the event that you become mentally incapable of managing your own affairs?

(a) Name

Address

(b) Name

Address

.....

As the enduring power of attorney been registered with the Court of Protection

Yes No

If you have not been able to make an appointment of an attorney and wish to do so please provide the following information. Name and address of two attorneys

(1) Name

Address

(2) Name

Address

.....

PART E – BENEFICIARIES

The main part of your estate is called “the residue”. (This is dealt with at question 17) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as “beneficiaries”.

15. CASH GIFTS.

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

(a) Name	£
Address	
.....	
(b) Name	£
Address	
.....	
(c) Name	£
Address	
.....	
(d) Name	£
Address	
.....	

16. GIFTS OF ARTICLES. ▼

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or the cash equivalent.

(a) Name	(c) Name
Address	Address
.....
Article	Article
(b) Name	(d) Name
Address	Address
.....
Article	Article

17. THE RESIDUE.

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 18.

(a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally;

(b) Everything to my children, named at question 4 above, equally and any other children of mine;

You may choose the age at which your children will receive their entitlement.

Insert choice from 18, 21 or 25 years in this box:

(c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named in the box below. If not in equal shares, then show the share each is to take.

.....

.....

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.....

.....

.....

18. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

(a) Name

Address

..... Share

(b) Name

Address

..... Share

Who is to benefit if the recipient dies before you?

(a) Name

Address

..... Share

(b) Name

Address

..... Share



GENERAL NOTES

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.

2. On divorce, gifts to your husband/wife are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.

3. If you are not making any provision for a husband/wife/partner, or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.

4. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

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