

WILL QUESTIONNAIRE

Date received instructions:

Fee Earner:

1. PERSONAL DETAILS

Full Name	
Professional Name or Alias (If Any)	
Address	
Telephone Number (Daytime)	
Telephone Number (Evening)	
E-Mail Address	
Marital Status (delete as appropriate)	Single/Married/Widow/Divorced/Cohabitee
Date of Birth	
Occupation	

2. EXISTING WILL

- a) YES/NO

- b) Where is the existing will stored?

- c) Where is the new will to be stored?

3. SPOUSE/CIVIL PARTNER

Full Name	
Address (If different from above)	
Date of Birth	
Occupation	
Marital Status	Single/Married/Widow/Divorced/Cohabitee
Existing Will	Yes/No

4. CHILDREN

Full Name	Address	Date of Birth	Status *

* Legitimate/Illegitimate/Adopted/Mentally Handicapped/Step Child

5. GRANDCHILDREN

Full Name	Address	Date of Birth	Name of Parent

6. PROPERTY TO BE COVERED BY THIS WILL

- a) Worldwide
- b) UK only
- c) Other

7. DECLARATION OF:

- a) Domicile (specify)

- b) Applicable Law (specify)

8. DISPOSAL OF BODY – SPECIAL DIRECTIONS?

- a) Burial

- b) Cremation

- c) Donation for Medical Research

- d) Other

9. EXECUTORS

Name/ Organisation Name	Address	Relationship to Client

10. SUBSTITUTE EXECUTORS

Name/ Organisation Name	Address	Relationship to Client

11. LEGACIES

Amount/ Description	Full Name and Address	Tax and Expenses (delete as appropriate)	Date of Birth (if under 18)
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
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		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	
		Free of Tax/ Subject to Tax/ Free of Expenses/ Subject to Expenses	

* Entitled for life/Entitled absolutely/Entitled at discretion of Executor/Entitled at a specific age/Entitled until remarriage

13. LAND AND BUILDINGS

Address	Sole/Joint Ownership	Joint Owner and Proportion	Value

14. PERSONAL POSSESSIONS

Item	Sole/Joint Ownership	Joint Owner and Proportion	Value

15. BANK, BUILDING SOCIETY, NATIONAL SAVINGS ACCOUNTS AND PREMIUM BONDS

Item	Sole/Joint Ownership	Joint Owner and Proportion	Value

16. SHARES, UNIT TRUSTS AND INVESTMENT TRUSTS

Item	Sole/Joint Ownership	Joint Owner and Proportion	Value

17. INSURANCE POLICIES

Item	Sole/Joint Ownership	Joint Owner and Proportion	Value

18. DEBTS

Item	Secured/Unsecured	Indemnity Insurance	Value

19. FOREIGN ASSETS

Item/Address	Sole/Joint Ownership	Joint Owner and Proportion	Is there a foreign will?	Value

20. BENEFICIARY UNDER ANOTHER'S WILL OR TRUST

Date of Trust	
Settlor of Trust	
Trustees	
Trust Managers (If different from above)	
Interest	

21. GUARDIANS OF INFANT CHILDREN

Name	Address	Relationship to Client