

# The Deans Legal Services

## WILLS QUESTIONNAIRE

<p><b>Is the preparation of Will(s) urgent? If so, why – Are you due to go on holiday or have a serious operation booked?</b></p>		
<p><b>Personal information:-</b></p>	<p>[1]</p>	<p>[2]</p>
<p>Your full name including courtesy titles and any alternative names used that should be recited</p>		
<p>Full address including postcode</p>		
<p>Contacts: Home phone Work phone Fax Mobile</p>		
<p>Marital status Dates of divorces etc will assist</p> <p>Notes</p>	<p>Married      <u>OR</u> about to be</p> <p>Civil Partner      <u>OR</u> about to be</p> <p>Divorced      <u>OR</u> about to be</p> <p>Separated      Widow(er)</p> <p>Single</p>	<p>Married      <u>OR</u> about to be</p> <p>Civil Partner      <u>OR</u> about to be</p> <p>Divorced      <u>OR</u> about to be</p> <p>Separated      Widow(er)</p> <p>Single</p>
<p>Date of marriage/ civil partnership</p>		
<p>Sex</p>	<p>Male</p> <p>Female</p>	<p>Male</p> <p>Female</p>
<p>Date of birth</p>		

Maiden or former name Or 'also known as'		
Nationality		
Tax residence? Or domicile, if known		
Occupation If retired, former occupation		
In the case of divorce, (a)decree absolute issued?		
(b) was the divorce on clean financial break? (c)If maintenance is payable is this until a date or your death?		
If a former spouse or civil partner has died, please advise us as to whether they made use of their nil rate band. If the nil rate band has not been used on the former spouse/civil partner's death, this can be used on your death but the following should be placed with your Will, a copy of the Death Certificate, Grant of Probate (Letters of Administration), any Deed of Variation or Will or Intestacy and the Inheritance Tax forms.		

<b>Dependants:-</b>	<b>[1]</b>	<b>[2]</b>
<p>Do you have Children?</p> <p>If not your child naturally or of you both please explain</p>	<p>If you each have children list them in your own column</p>	<p>If children are shared / you are both natural or adopted parent write 'as column 1'</p>
<p>Notes</p>	<p>[a]</p> <p>Date of birth? In education? Living with testator?</p>	<p>[a]</p> <p>Date of birth? In education? Living with testator?</p>
<p>Notes</p>	<p>[b]</p> <p>Date of birth? In education? Living with testator?</p>	<p>[b]</p> <p>Date of birth? In education? Living with testator?</p>
<p>Notes</p>	<p>[c]</p> <p>Date of birth? In education? Living with testator?</p>	<p>[c]</p> <p>Date of birth? In education? Living with testator?</p>
<p>Notes</p>	<p>[d]</p> <p>Date of birth? In education? Living with testator?</p>	<p>[d]</p> <p>Date of birth? In education? Living with testator?</p>
<p>Other dependants?</p> <p>Do you have a Pet or Pets? Appoint guardian for Pets? Is there a gift of money conditional on taking pets?</p> <p>Do you give anyone money on a regular basis?</p>		

<b>Previous Will and Codicil(s)</b>		
The details below will assist if available		
Who prepared them?		
Dates of documents		
Are copies of executed documents available?		
Were <b>any</b> previous Wills mutual Wills		
Are there any powers of appointment [a] general [b] special Owned by the testator? (if yes, please provide copies of powers)		
Did previous Wills exercise any specific or general powers of appointment?		

<b>Foreign assets/wills</b>		
Do you own property or have money anywhere but the UK?		
Do you have any existing foreign Wills?		
Make this will to deal with just UK assets or worldwide?		
Is a new foreign Will required to deal with non-UK assets?		

<b>Memory / Cognition</b>		
Do you have any medical issues affecting memory?		
Are you waiting for any Assessments or treatment?		
Notes?		

<b>Assets</b>	<b>[1] £</b>	<b>[2] £</b>	<b>[joint] £</b> N.B. record proportion of ownership and type of joint ownership
<p>Providing financial information in this much detail is not essential, but proof that you know the size and nature of your estate can be important in any future claims against your capacity to make a Will. If you prefer you can give totals per type but a general idea of the size of your estate is essential.</p>			
<p><b>Cash/liquid assets</b> [1] [2] [3] [4]</p>			
<p><b>Chattels</b>  (personal goods of value)</p>			
<p><b>Investments</b> [1] unit trusts [2] quoted [3] options [4]</p>			
<p><b>Life Policies</b> [1] [2] [3] N.B. [1] Care, any written in trust? [2] Any charged with debts? [3] Whose life are they on?</p>			
<p><b>Matrimonial home</b> Approximate value £  Is there a mortgage and if so, how much?  Is there any mortgage protection cover or similar?</p>			
<p><b>Other real and leasehold property</b> Approximate value £  Is there a mortgage and if so, how much?  Is there any mortgage protection cover or similar?</p>			

<p><b>Business and or APR property</b>  [1] business activity?  [2] sole trade or partnership?  [3] ownership of assets used in business</p>			
<p><b>Private Companies</b>  Business activity?  Share structure and other shareholders if material</p>			
<p><b>Non-UK assets</b></p>			
<p><b>Other assets?</b>  [1]  [2]  [3]  <b>Literary assets?</b></p>			
	<b>Total</b>	<b>Total</b>	<b>Total</b>
<p>Any other factors, including:   Potential inheritances,  Pension policies (N.B. care over nominations) Death in Service benefits (N.B. care over nominations)   Any recent inheritances where QSR or DoV might be appropriate?   <b>Have you ever been a beneficiary of a Trust?</b></p>			
<p><b>Gifts</b>   Have you made any gifts in the last 7 years? Please give name and approximate amount</p>			
	<b>Total</b>	<b>Total</b>	<b>Total</b>



<p>Specific Bequests (Gifts of particular items)</p> <p><i>N.B. On which death are they to take effect?</i></p> <p>[1]</p> <p>[2]</p> <p>[3]</p> <p>[4]</p>		
<p>Pecuniary Legacies (Gifts of sums of money)</p> <p><i>N.B. On which death are they to be payable?</i></p> <p>[1]</p> <p>[2]</p> <p>[3]</p> <p>[4]</p>		
<p>Charitable Legacies</p> <p><i>N.B. On which death are they to be payable?</i></p> <p>[1]</p> <p>[2]</p> <p>[3]</p> <p>[4]</p> <p>N.B. Are they UK registered charities?</p> <p>What if they cease to exist/change name/merge, etc.</p>	<p><b>Consider 10% of value of estate gift of charitable legacy if estate is taxable as there would be a discount on the inheritance tax payable</b></p>	



Residue

Who gets the rest of your estate and in what shares?

(Gift over - If that person dies before you, should their share go to their children?)

(If a person dies before you and there is no Gift over should their share be distributed to the other beneficiaries? Or to someone else?)

If all beneficiaries die before you or if any shares are not claimed, what should happen to (that share of) your estate?

Are you interested in learning more about Lasting Powers of Attorney?    YES    /    NO

Any other relevant information?

Signed \_\_\_\_\_ Date \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_