

# The Deans Legal Services

## WILLS QUESTIONNAIRE

<p><b>Is the preparation of Will(s) urgent? I so, why – Are you due to go on holiday or have a serious operation booked?</b></p>	
<p><b>Personal information:-</b></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 Mobile</p>	
<p>Marital status Dates of divorces etc will assist  Notes</p>	<p>Married                      <u>OR</u>      About to be married Civil Partner                <u>OR</u>      About to form CP Divorced                      <u>OR</u>      About to be divorced Separated                                      Widow(er) Single</p>
<p>Date of marriage/ civil partnership</p>	
<p>Sex</p>	<p>Male                                      <u>OR</u>      Female</p>
<p>Date of birth</p>	
<p>Maiden or former name  Or 'also known as'</p>	

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>
Do you have Children?  If not your child naturally please explain	
Notes	[a]  Date of birth? In education? Living with testator?
Notes	[b]  Date of birth? In education? Living with testator?

Notes	[c]  Date of birth? In education? Living with testator?
Notes	[d]  Date of birth? In education? Living with testator?
Other dependants?  Do you have a Pet or Pets? Appoint guardian for Pets? Is there a gift of money conditional on taking pets  Do you give anyone money on a regular basis?	

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

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

<b>Assets</b>	<b>[1] £</b>
<p><b>Cash/liquid assets</b></p> <p>[1] [2] [3] [4]</p>	
<p><b>Chattels</b></p> <p>(personal goods of value)</p> <p><b>Includes cars, jewellery antiques etc</b></p>	
<p><b>Investments</b></p> <p>[1] unit trusts [2] quoted [3] options [4]</p>	
<p><b>Life Policies</b></p> <p>[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>Home</b> Approximate value £</p> <p>Is there a mortgage and if so, how much?</p> <p>Is there any mortgage protection cover or similar?</p> <p>Notes</p>	
<p><b>Other real and leasehold property</b> Approximate value £</p> <p>Is there a mortgage and if so, how much?</p> <p>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]</p> <p><b>Literary assets?</b></p>	
	<p><b>Total</b></p>

<p>Any other factors, including:</p> <p>Potential inheritances, Pension policies (N.B. care over nominations) Death in Service benefits (N.B. care over nominations)</p> <p>Any recent inheritances where QSR or DoV might be appropriate?</p> <p><b>Have you ever been a beneficiary of a Trust?</b></p>	
<p><b>Gifts</b></p> <p>Have you made any gifts in the last 7 years? Please give name and approximate amount</p>	
	<b>Total</b>
<b>INSTRUCTIONS</b>	
<p>Do you have any special requirements when you sign your Will? For example issues with your sight, reduced ability to hold a pen?</p>	
<p>Are Wills to be made in expectation of marriage/civil partnership? If yes, are any terms to be conditional upon that marriage/civil partnership taking place or not? Other party to the intended marriage/civil partnership?</p>	
<p>Executors</p>	

Substitute Executors if those selected unable to act?	
Funeral instructions?  If have plan include details	Buried <u>OR</u> Cremated
Guardians  (if you have children under 18)	

Specific Bequests (Gifts of particular items)  [1]  [2]  [3]  [4]	
Pecuniary Legacies (Gifts of sums of money)  <i>N.B. On which death are they to be payable?</i>  [1]  [2]  [3]  [4]	

<p>Charitable Legacies</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>Residue</p> <p>Who gets the rest of your estate, and in what shares?</p> <p>(Gift over - If that person dies before you, should their share go to their children?)</p> <p>(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?)</p>	



<p>If all beneficiaries die before you or if any shares are not claimed, what should happen to (that share of) your estate?</p>	
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<p>Are you interested in learning more about Lasting Powers of Attorney?    YES    /    NO</p>
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Any other relevant information?

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