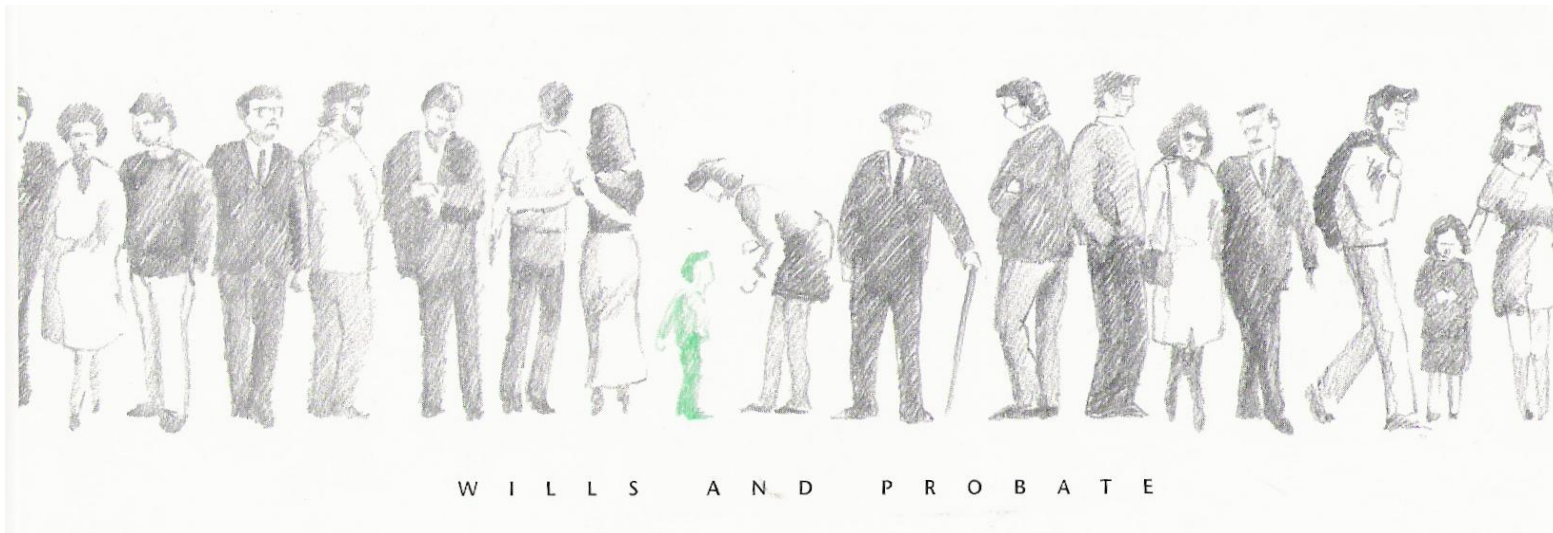


Why leave it all to chance?



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Will Questionnaire

Why make a will?

- To determine “who gets what” after you die. If you do not have a will the government will decide. For example:-

If you are married or in a civil partnership, your spouse or civil partner may not inherit all of your property. Some may pass to other relatives.

If you are not married or in a civil partnership, your partner may have to apply to court to inherit any of your property.

- To make special provision for your children in case you die while they are young. For example:-

You can appoint Guardians.

You can determine at what age your children have unlimited access to your property. You may feel that 18 is too young.

- If you have a will already but your circumstances have changed, your will may no longer be valid or have the effect that you want. For example:-

If you have recently married or entered into a civil partnership.

If you have recently divorced or separated.

If your wishes have changed.

- To try to reduce the Inheritance Tax payable by your estate.

Planning your will?

The purpose of this questionnaire is to help us know what you want in your will. Completing this form will save you time and give us the key facts we need.

Read through the questionnaire and then complete the sections which apply to you. Please ensure that you give full names and addresses. If at any time you need more space please just continue on a separate sheet of paper and attach that to this questionnaire.

Please give approximate values of your main assets. This information will help us identify whether you need any advice about Inheritance Tax

If you are a member of any scheme under which a lump sum will be payable on your death before retirement age, or if you are a beneficiary of any trust or estate, or have any property abroad, please make sure you give us brief details.

About you

Your full name _____

Address: _____

Postcode: _____ Tel no: _____

Date of birth: _____ Occupation: _____

Any former name you have had: _____

Marital status: Single ☐ Married/Civil Partnership ☐ Divorced ☐ Separated ☐

Cohabiting ☐ Widowed ☐

About your spouse/partner

Full name: _____

Address (if different to above) _____

Postcode: _____ Tel no: _____

Date of birth: _____ Occupation: _____

Any former name he/she has had: _____

Marital status: Single ☐ Married/Civil Partnership ☐ Divorced ☐ Separated ☐

Cohabiting ☐ Widowed ☐

If you and your partner are not currently married/in a civil partnership do you intend to marry/enter into a civil partnership? Yes ☐ No ☐

About the children

Please give the full names, addresses and dates of birth of your children, indicating whether they are step-children or from previous relationships if applicable:

Do you maintain or give financial help to anyone you do not to provide for in your will?

If so, please give details: _____

Your Executors

Executors are the people who will carry out the wishes you express in your will. Executors can also be beneficiaries under your will. Ideally you should appoint two executors or at least appoint substitute executors to act if the first-named executor has died. Often people like to appoint their spouse/partner and appoint a substitute (often a family member or close family friend, together with a professional such as a solicitor) to act if the spouse/partner has died. Please specify who you would like to appoint as your executor(s) and also whether they are to act as substitutes. Executors must be aged 18 or over.

First Executor:

Full name: _____

Address: _____

Postcode: _____

Relationship to you (if any): _____

Second Executor:

Full name: _____

Address: _____

Postcode: _____

Relationship to you (if any): _____

Do you wish Easthams Solicitors Limited to act as executors? Yes ☐ No ☐

If yes, is this only if your first-named choice is unable to act? Yes ☐ No ☐

Guardians

If you have young children you can use your will to nominate individuals to look after them in the event of you and your spouse/partner dying before the children reach the age of 18. Please note that only a person with "parental responsibility" can appoint a guardian. We will discuss this with you further if you wish.

Please specify who you would like to appoint as guardians?

Full name(s): _____

Address(es): _____

Relationship (if any) to you: _____

Cash gifts and gifts of your possessions

Cash gifts

You can leave specific amounts of money to specific individuals or organisations. Please be aware that cash gifts will be distributed before your "Residuary Estate" (see below) and assets may have to be sold to raise that cash. It is therefore important that you do not make cash gifts at the expense of the beneficiaries of your Residuary Estate unless that is what you want. Please discuss this with us further if you wish.

If you want to make cash gifts please give details of the amount you want to give, the beneficiary (and his or her age if currently under 18), and the minimum age (if any) at which he or she (if an individual) can inherit the money.

Full name: _____

Address: _____

_____ Postcode: _____

Age (if under 18): _____ Relationship to you (if any): _____

Age at which to inherit (if applicable): _____

Amount of gift: _____

Specific gifts

You can give particular items to specific individuals or organisations. Gifts of specified items can even be made by reference to a letter to be placed with your will. You can let certain individuals choose for themselves what they would like from your belongings. Your belongings can be divided between one or more people or organisations.

Please be aware that these gifts will be distributed before your Residuary Estate and cash gifts, and so it is important that you do not make these gifts at the expense of the beneficiaries of your Residuary Estate or cash gifts unless that is what you want. Please discuss this with us further if you wish.

If you want to make a specific gift please give a brief description of the item you want to give, details of the beneficiary (and his or her age if currently under 18), and the minimum age (if any) at which he or she (if an individual) can inherit the gift.

Full name: _____

Address: _____

_____ Postcode: _____

Age (if under 18): _____ Relationship to you (if any): _____

Age at which to inherit (if applicable): _____

Item(s): _____

Residuary Estate

What do you want to happen to everything else you own? This is called your Residuary Estate. The value of this is arrived at after your funeral costs and any debts have been paid, and after the gifts (if any) of money and possessions referred to above have been made.

Often the Residuary Estate is left to a spouse/partner, but with a provision that if he or she has died first that it is left between your children. Another popular scenario is that the Residuary Estate is divided between a number of individuals or organisations.

Your Residuary Estate is likely to be the majority of your estate and you should consider carefully who you want to inherit and also give some substitutes in case your chosen beneficiaries have died before you.

The table below may help you to decide how to deal with your Residuary Estate. If none of these options are appropriate please use a separate sheet of paper and attach it to this questionnaire.

A. If you have a spouse/partner

Do you want to leave your Residuary Estate to your spouse/partner? Yes ☐ No ☐

If No, please go to Section B or C

If your spouse/partner dies before you, do you want to leave your Residuary Estate equally between your children? Yes ☐ No ☐

(If No, please give details at Section C of who you want to leave your Residuary Estate to if your spouse/partner dies before you)

Please specify at what age you would want your children to receive the capital from your Residuary Estate, if not 18.

If any of your children were to die before you would you want their children (if they have any at that time) to inherit their share? Yes ☐ No ☐

At what age would you want them to inherit?

B. If you have children, but no spouse/children

Do you want to leave your Residuary Estate equally between your children? Yes ☐ No ☐

(If No, please give details at Section C of who you want to leave your Residuary Estate to if your children die before you)

Please specify at what age you would want your children to receive the capital from your Residuary Estate, if not 18.

If any of your children were to die before you would you want their children (if they have any at that time) to inherit their share? Yes ☐ No ☐

(If No, please give details at Section C of who you want to leave your Residuary Estate to if your children die before you)

At what age would you want your grandchildren to inherit?

C. Other

Please specify to whom you would like to leave your Residuary Estate. You may for example wish to divide it between a number of individuals or organisations. You must specify the share of your Residuary Estate you want to leave them.

Full name: _____

Address: _____

_____ Relationship to you (if any): _____

Share of your estate _____ Age at which to inherit (if applicable): _____

Full name: _____

Address: _____

_____ Relationship to you (if any): _____

Share of your estate _____ Age at which to inherit (if applicable): _____

Full name: _____

Address: _____

_____ Relationship to you (if any): _____

Share of your estate _____ Age at which to inherit (if applicable): _____

If any individuals named above die before you, or any named organisations cease to exist, do you want the gift they would have received to be divided between the other individuals/organisations named above? Yes ☐ No ☐

If no, please state what you want to happen to the gift the individual/organisation would have received.

Funeral wishes

If you wish you can include any specific wishes you have regarding your funeral, for example whether you wish to be buried or cremated. Please specify any such wishes here.

PLEASE SIGN BELOW TO CONFIRM THAT YOU WANT EASTHAMS SOLICITORS LIMITED TO PREPARE YOUR WILL IN ACCORDANCE WITH THE RELIES TO THE ABOVE QUESTIONS. IF WE ARE TO PREPARE A "MIRROR WILL" FOR YOUR SPOUSE/PARTNER PLEASE ENSURE THAT HE OR SHE ALSO SIGNS.

Signed _____ Signed _____

Dated _____ Dated _____

☐ Tick to confirm that your payment on account is enclosed with this questionnaire

Assets and Liabilities

Please give approximate values for the following assets and liabilities. This will help us ascertain your Inheritance Tax planning needs.

	You	Spouse/ partner	Joint
Assets	Value of Asset		
Land & Property			
Bank/Building Society Accounts			
Stocks, Shares & Unit Trusts			
ISAs & PEPs			
Premium Bonds/National Savings			
Private company shares, business or partnership interests (indicate the % of your ownership).			
Agricultural property			
Other investments – please specify			
Furniture/Personal Possessions			
Pensions – value of lump sum death Benefits			
Life Policies			
Cars and other Vehicles			
Foreign Property			
Any other Assets (eg beneficiary of a trust) (please specify)			
	You	Spouse/ partner	Joint
Liabilities	Amount of Liabilities		
Mortgage			
Loans			
Any other liabilities (please specify)			

If you have any questions or concerns please call us on 0800 0324132 and we will be happy to help.

Please note that completing this questionnaire does not create a will.