



S O L I C I T O R

With you every step of the way

WILL QUESTIONNAIRE

Full name Please include courtesy titles and any alternative names or aliases that should be referred to	
Maiden or former name(s)	
Full address (including postcode)	
Contact Telephone	
Contact Email	
Gender	
Date of birth	
Place of birth	
Nationality	
Where are you resident for income tax purposes?	
Domicile (if non-UK, please give details)	
Occupation	
Details of any medical conditions	

Partners full name Please include courtesy titles and any alternative names or aliases that should be referred to	
Maiden or former name(s)	
Full address (including postcode)	
Date of birth	
Date of death (if applicable)	

Marital Status	Married/Civil Partner/Separated Widow(er)/Divorced/ Single
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Are you planning or expecting to marry or form a civil partnership in the foreseeable future?	
If you are divorced, please give details of:	Date of Decree Absolute Whether or not maintenance is paid and how much; and Whether there was a “clean break” barring claims against future inheritances

Your Children - Please include details such as: <ul style="list-style-type: none"> • adoption, • step-child, • whether born in current marriage • whether born in previous marriage 	Name, date of birth, address	Name, date of birth, address
	Name, date of birth, address	Name, date of birth, address

Who would you like to appoint to act as Guardians for your children (while they are under the age of 18)*	Name: Address:	Name: Address:
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* If anyone other than you has parental responsibility for your child(ren) they will automatically act as guardian after your death.

Please note: If your will is worded and the timing/circumstances of your death are such that beneficiaries might be under the age of 18 years old when you die, they will not be able to inherit what you leave them, until they reach the age of 18. Until that time, your Executors/Trustees will be responsible for looking after those inheritances, investing them for the benefit of the beneficiaries and exercising their discretion as to whether or not to make any early distributions of capital or income to those beneficiaries.

Those early distributions might be to cover things such as school fees, holidays, day to day living costs and the like. In addition, your will can specify that any beneficiary must attain an older age than 18, before they can inherit. However, there is a possibility that you will not be able to benefit from a tax allowance known as the Residential Nil Rate Band. Whatever age is chosen, that is the age at which the beneficiary in question can insist on being paid their inheritance. Prior to that age, they can ask the Executors/Trustees for an early distribution of income and/or capital and the Executors/Trustees can decide whether or not to do so.

You may wish to instruct us to prepare for you a Letter of Wishes, which can set out the sorts of purposes for which you would be happy for money to be advanced early, such as university tuition fees, driving lessons, a deposit on a house, or similar “worthwhile” purposes. This letter can be for the combined benefit of your children, Executors and Guardians, when considering whether early advances should be made. Please indicate in the box below any specific instructions or preferences you have at this stage and we will discuss this matter further where it is relevant to you.

Your grandchildren	Name, date of birth, address	Name, date of birth, address
	Name, date of birth, address	Name, date of birth, address

Other financial dependants (relatives, friends)	Name, Address, Nature & Extent of Financial Support:	Name, Address, Nature & Extent of Financial Support:
	Name, Address, Nature & Extent of Financial Support:	Name, Address, Nature & Extent of Financial Support:

Is there anyone who could have a claim on your Estate, such as a spouse or former spouse, partner or child, or other person you are (or have been) financially supporting but who you are not including as a beneficiary in your will?

Do you want this will to cover all of your worldwide assets, or just those in the UK?	I only have UK assets
	I have worldwide assets but I only want my will to cover my UK assets
	I have worldwide assets and I want my will to cover my UK assets and my worldwide assets

Previous Will	Date executed:
	Where stored:

Funeral arrangements (cremation/burial, location, scattering of ashes):	
Directions regarding Organ Donation/Medical Research	
NOTE: To opt out you must call 0300 123 2323 or fill out an NHS Organ Donor Register withdrawal form	

Executor(s) You can appoint someone to act as sole Executor however we suggest that you appoint at least two Executors. You may choose to appoint a primary Executor and a named substitute if the	Surviving Spouse or Partner: Sole/Joint/Substitute (Delete as appropriate)	Name: Address: Relationship to you: Sole/Joint/Substitute (Delete as appropriate)
	KJ Cox Solicitor: Sole/Joint/Substitute (Delete as appropriate)	

primary Executor cannot act. You may appoint up to four Executors.	Name:	Name:
	Address:	Address:
	Relationship to you:	Relationship to you:
	Sole/Joint/Substitute (Delete as appropriate)	Sole/Joint/Substitute (Delete as appropriate)

Lifetime Gifts already made by you if greater than £3,000 per year (this may affect your Inheritance Tax position – we will discuss this with you)	Recipient:	Recipient:
	Date of Gift:	Date of Gift:
	Amount:	Amount:
	Recipient:	Recipient:
	Date of Gift:	Date of Gift:
	Amount:	Amount:

You must make us aware of any if your named beneficiaries are:

- **suffering from any mental or physical disability**
- **going through bankruptcy or are classed as undischarged bankrupts**
- **going through divorce proceedings or in the process of separating**

Such beneficiaries might lose their means-tested benefits if they inherit from you, or any inheritance they receive might go to their creditors (in a bankruptcy) or an estranged spouse (in a divorce).

Gift of your Home Would you like your share of your home to automatically be inherited by the surviving joint-owner or follow the wishes in your will	
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Specific Gifts (NOT MONEY - such as ornaments, motor vehicles or jewellery) that you would like to include in your will.	Beneficiary:	Beneficiary:
	Item:	Item:
	Beneficiary:	Beneficiary:
	Item:	Item:
	Beneficiary:	Beneficiary:
	Item:	Item:
	Beneficiary:	Beneficiary:
	Item:	Item:

Gifts of Money, including gifts to charity that you would like to include in your will.	Beneficiary:	Beneficiary:
	Amount:	Amount:
	Beneficiary:	Beneficiary:
	Amount:	Amount:
	Beneficiary:	Beneficiary:
	Amount:	Amount:
	Beneficiary:	Beneficiary:

Distribution of the Rest of Your Estate (i.e. other than as stated above as specific gifts or gifts of money)				
Name of Beneficiary	Address	Outright gift, or conditional upon becoming an adult	Proportion of estate (%)	Substitute to their children if beneficiary dies before you?

Who would you like to inherit your estate if the people named above do not survive you?				
Name of Beneficiary	Address	Outright gift, or conditional upon becoming an adult	Proportion of estate (%)	Substitute to their children if beneficiary dies before you?

DETAILS OF YOUR ASSETS AND LIABILITIES

	Brief Details (address/valuations etc)
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Main Residence	
Second home	
Mortgages and other debts	
Quoted Stocks and Shares	
Unit Trusts/Investment Bonds	
Bank Accounts	
Building Society Accounts	
National Savings & Investments / Premium Bonds	
Life Policies/Pensions	
Interests & Shares in unquoted or family companies	
Agricultural Property	
Overseas Property	
Assets in trusts, where you are a beneficiary or a trustee	
Personal Belongings – <i>valued at over £500</i>	

Death in Service Benefits, Life Policies and Pension Lump Sums

** For most life policies, death in service benefits or pension lump sums, it is possible to nominate them or “write them in trust” for a named party. Once you have done this during your lifetime, HM Revenue & Customs will treat the proceeds of the policy as belonging to the recipient/beneficiary rather than you and therefore the payment will be outside of your estate for Inheritance Tax purposes. It will also pass to the nominated recipient regardless of what your will says.*

Provider Amount Due Is the policy nominated or written in trust for specific beneficiary	
Provider Amount Due	

Is the policy nominated or written in trust for specific beneficiary	
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Do you have a financial adviser? If so please provide their name, address and contact number	
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Do you have an accountant? If so please provide their name, address and contact number	
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Are there any special provisions you would like included in your Will or anything else you would like to discuss?	
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Date of completion of this form	
Completed by (print name)	
Completed by (sign)	

You may wish to consider creating a Lasting Power of Attorney. This is a way of making sure that your affairs can be dealt with by a person or people of your choice in the event that you become incapable of managing your own affairs through physical or mental incapacity.

The attorney(s) could have power to deal with all your financial, property and medical affairs or only those matters which you specify.

If you would like to consider or discuss making a Lasting Power of Attorney or would like to look through some documentation in relation to it, please mention this during our meeting.