

Will Questionnaire

All information will be treated in the strictest confidence

Details Required

YOUR DETAILS

Full Name

Title: Mr/Mrs/Miss/Ms/Other

Full Address
including postcode

Date of Birth

Telephone number

Home:

Work:

Marital status
Please tick appropriate box

- Single**
- Married**
- Separated**
- Divorced**
- Widowed**
- Partner/Common Law Spouse**

If married, date of marriage

Note

If you are married and living with your spouse or living with a partner he/she is strongly advised to make a Will. If they wish to do so please contact us and we shall forward the appropriate questionnaire for completion.

Divorce or Remarriage

Generally divorce treats a former spouse as if he or she had predeceased you so that no gift will pass to them nor can they act as Executors even if named as such. In other respects however, the rest of the Will remains valid.

If you have made a Will and then marry or remarry, the Will may be cancelled and the rules of intestacy would apply. However, a valid Will can be made taking into account a

planned marriage or remarriage which you should indicate below if appropriate.

Notwithstanding the above, do you have any financial dependants whom you do not wish to benefit under your Will (e.g. spouse, former spouse or partner or children)

*If yes,
We will be pleased to advise you.*

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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Do you intend to marry/re-marry in the near future?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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Would you like your new Will to take this into account?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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Is your permanent home in England or Wales?

If not, please state which country.

Is your ability to read and sign your Will affected by any condition?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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If yes please supply details.

Details Required

Give the **full** names and dates of birth of any children you have. Please indicate if they are male or female.

Executors are persons whom you appoint in your Will to carry out your wishes and administer your Estate.

You may consider appointing a relative or close friend with additional or substitute Executors.

This is a responsible position with some duties imposed by law and you may therefore consider appointing a professional Executor such as a solicitor. As a firm, we would be

pleased to accept an appointment solely or with other persons and can offer full services for the efficient administration of you Estate.

An Executor can be a beneficiary under your Will.

Whom do you wish to appoint as Executor(s)?

Please tick the appropriate box from the following statements:

Give the full names and addresses of all persons named below. Please state their relationship to you. (i.e my sister, brother-in-law, friend, etc.)

A. I wish to appoint the person(s) named to the right to act as my Executor(s)

A

B. I wish to appoint the person(s) name to the right with Taylors Legal

B

C. I wish to appoint Taylors Legal

C

Do you have any assets outside England and Wales? If so, please Give full details including where situate.

ASSETS OWNED BY YOU

DETAILS	YOUR ASSETS
Land & Property	
Furniture	
Personal Effects	
Motor Cars	
Bank Accounts	
Building Society Accounts	
National Savings	
Stocks & Shares	
Personal Equity Plans	
Tessas	
Life Assurance	
Superannuation Benefits	
Interest in another Estate or Trust	
Cash	
Other Assets	
TOTAL	

LIABILITIES	YOUR DETAILS
Mortgages Outstanding	
Credit Cards	
Other	
TOTAL	

NET ASSETS/LIABILITIES	
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Some Assets may fall outside your Will:

- Pension fund trustees usually have discretion to distribute the pension scheme death benefits and your wishes should be notified to the trustees. Similar consideration may apply to death in service schemes.
- The proceeds of a Life Assurance Policy written in trust are payable to the person named.
- Jointly owned assets may pass to the surviving owner(s)

Please specify, in the last 7 years, you have made any gifts of sums of money or property the total value of which exceeded £3,000 in any one tax year.

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Details Required

Do you wish to leave your body for medical research?

YES	
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NO	
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Do you wish to donate your organs for transplantation?

YES	
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NO	
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If yes, do you wish to donate all of your body?

YES	
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NO	
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If no, please specify which parts of your body you wish to donate.

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Is it your wish to be buried or cremated? Please specify.

Buried Cremated No preference

Please detail any specific funeral instructions.

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If you have any children under the age of 18, you should consider appointing at least one Guardian. When one parent dies, the surviving parent normally becomes the legal Guardian, but it is of course possible that both parents may die together or you may be a single parent. Where a man is not married to the mother of his children he will not automatically become their guardian on the death of their mother. Please indicate if you require further advice.

We will provide in you Will for your Trustees to have power to make payments it the Guardians for the maintenance, education and general benefit of your children.

If you wish to make a guardianship appointment, please give full details

1st or Sole Guardian:

Name	
Address	
Relationship to you	

2nd joint Guardian (*if appropriate*):

Name	
Address	
Relationship to you	

If the person(s) named above are unable or unwilling to act, do you wish to make a substitute appointment? If so, please give full details

1st or sole substitute Guardian (*if appropriate*):

Name	
Address	
Relationship to you	

2nd substitute joint Guardian (*if appropriate*):

Name	
Address	
Relationship to you	

Before dealing with the residue of your Estate are there any specific sums of money which you wish to leave to a particular person or charity?

If so please give the **Amount(s) you wish to give and the full name(s) of the recipient(s) together with their address(es) and, if appropriate, relationship(s) to you**

YOUR DETAILS

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In the event of the person(s) named above dying before you, do you wish the gift to pass to any child or children they may have?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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Before dealing with the residue of your estate are there any specific items (for example, jewellery) which you wish to leave to a particular person?

If so please give the **descriptions of the item(s) and the full name(s) of the recipient(s) together with their address(es) and, relationship(s) to you**

If you wish to leave a number of specific items, we suggest that you provide the full details in a separate list. In turn this list will be referred to in your Will. Should you wish to make any changes to the list in the future, you will not have to change your Will.

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