

WALTER
GRAY
& CO

SOLICITORS
COMMISSIONERS
FOR OATHS

WILL QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of your appointment if made, is set out below.

Your appointment is with _____

Date _____

Time _____

Part 1 – You and Your Family

(a) Your Details

Full Name (including all first names)
Address:
Telephone No:
Date of Birth:
Occupation:
National Insurance No:

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details:

(b) Your Spouse's/ Civil Partner's/ Partner's Details:

Full Name (including all first names)
Address (if different)
Date of Birth:
Occupation:
National Insurance No:

(c) Details of your marital status:

Are you married/ in a civil partnership with your Partner?	Yes/ No
Have either of you been married/ in a civil partnership before?	Yes/ No
If you are not currently married or in a civil partnership, are you intending to marry or form a Civil partnership in the near future?	Yes/ No/ N/A

(d) Details of your children (please state if these are children from a previous relationship or adopted children)

Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address (if different)	Address (if different)
Full Name:	Full Name:
Date of Birth:	Date of Birth:
Address (if different)	Address (if different)

N.B Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children. Children excluded from benefit under your Will may have a right to claim a share of you property in certain circumstance Please ask for advice, if appropriate.

Part 2 – Your Property and other Assets and Liabilities

(a) Your Home

Is your home owned	
(a) in your name alone	yes / no
(b) in joint names with your spouse / partner / civil partner	yes / no
(c) in the name of your spouse / partner / civil partner alone?	yes / no
What is the current value of your property?	£
Is your property mortgaged? If so please give account details	
Where are the deeds held?	

(b) Asset details – Please give approximate values of your other main assets below:

House Contents
Antiques
Jewellery
Cars / vehicles
Special Collections (e.g. coins, stamps etc)
Pensions
Is your Pension subject to trusts governing destination at your death?
Life Policies
Building Society Accounts
Bank Accounts
National Savings
Income Bonds
Deposit Bonds
Premium Bonds
Unit Trusts
Government Stocks

Benefits from another person's estate
Other

N.B. Jointly owned assets generally pass to the co-owner automatically on death and cannot be given away by Will. The status of joint ownership can, however, be changed in certain circumstances to avoid this happening if required. Please ask for further details.

(c) Business Details (if applicable)

Please state the type of business		
Is it a company	partnership	or in your sole name?

(d) Your Liabilities

Please give approximate values of your main liabilities below:

First mortgage	
Second mortgage	
Other loans	
Overdraft	
Hire purchase	
Credit Cards	
Other	

(e) Do you own assets abroad?

If so please give details	
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Part 3 – Funeral wishes, Executors and Guardians

(a) Funeral Wishes

You may specify in your Will if you wish to be buried or cremated. If you have any particular funeral wishes, please provide details below.

Please note:

- You should make these wishes known to your immediate family as well and not rely on what is stated in your Will
- If you wish to leave any part of your body for medical purposes, tell your family and your doctor and carry a donor card

(b) Executors and Trustees

You must appoint executors to carry out the instructions set out in your Will. It is wise to have at least two and you may appoint your husband / wife/ civil partner / partner as one. A beneficiary can also be an executor. You should name other executors to act in substitution. The Partners in Walter Gray & Co will be pleased to act as your executors alone or with a family member or a friend.

Please list below up to four chosen executors:

Name:	Address:
Name:	Address:
Name:	Address:
Name:	Address:

Would you like the Partners in Walter Gray & Co to act as your Executors? Yes / No

(c) Guardians of young or infant children (if applicable)

Guardians should be considered if you have children who are under the age of eighteen years or if you expect to have children at a later date. Should you or your spouse be involved in an accident leaving an infant child or children surviving you, it is a good idea to name a person or persons whom you would like to care for and bring up your children. The appointment of a guardian does not mean that the children have necessarily got to live with the guardian. It simply means that it is the guardian who will have the say on where the children will live and how they are brought up and educated etc. A guardian can also be an executor and trustee.

The position may be different if you are a single parent or were not married when your child was born. Please discuss this with your solicitor at your appointment. Guardianship involves a lot of responsibility and we would recommend that you ask people to agree to act before appointing them.

Please list below your chosen guardians, if any:

Full Name:	Full Name:
Address:	Address:

Part 4 – Beneficiaries

The main part of your estate is called ‘the residue’. Before giving away the residue, you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or charities. These people are known as ‘beneficiaries’.

(a) Cash gifts

Please give the names and addresses of the beneficiary and the amount to be given together with the age of anyone who is under the age of eighteen.

Full Name:	Address:
Amount:	
Full Name:	Address:
Amount:	
Full Name:	Address:
Amount:	
Full Name:	Address:
Amount:	

(b) Gifts of articles

Please give below the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given a substituted item or the cash equivalent.

Full Name:	Address:
Article:	
Full Name:	Address:

Article:	
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(c) The Residue

This is all the monies or property (except jointly owned property) which is remaining after payment of any cash gifts, debts and all other expenses in administering the estate and payment of inheritance tax (if any).

The following are the more common provisions made. If you wish to use one of these tick the appropriate box, if not, we will discuss this in our meeting.

- (i) Everything to my husband / wife / civil partner / partner outright but if he / she has died then to my children equally:
- (ii) Everything to my children equally:
- (iii) Any named beneficiary who is under eighteen can call for payment of all monies due to them after reaching the age of eighteen. If you wish to prevent young beneficiaries from receiving this entitlement at such an age, please specify below the age at which they may receive their entitlement:
- (iv) To my husband / wife / civil partner / partner but if he / she has died before me to the person(s) or organisation(s) named in the box below. If not in equal shares, then please show the share each is to take.

If none of the above choices are appropriate then we can discuss matters further in our meeting.

You can leave someone a share in your estate for their lifetime only so that they will receive the income from the capital monies invested for their lifetime and then after their death the capital will go to another named beneficiary. Please tick this box if you wish to create a life interest and we will take your further instructions.

Have you made any substantial lifetime gifts? Yes / No

LASTING POWERS OF ATTORNEY

This is a legal document which enables someone you trust to deal with your financial affairs or personal welfare, on your behalf. This is a very useful document indeed, as it means that your finances or welfare can be looked after if you are unable to do so. We recommend that our clients create a Lasting Power of Attorney. Please ask us for more details.

POINTS TO NOTE:

- 1) Any subsequent marriage or Civil Partnership (CP) generally revokes an earlier Will, so you should make arrangements to make a fresh Will after marriage or CP or make a Will which takes a forthcoming marriage into account so as to avoid dying intestate, i.e. without a valid Will.
- 2) On divorce or dissolution of CP your Will is read as if gifts to your former spouse are cancelled as are their appointment as executors. The rest of the Will stands but divorce can create problems and it is advisable to make a new Will.
- 3) If you are not making provision in your Will for a spouse / partner or civil partner, a former spouse partner or other dependant, it is possible that he or she could make a claim against your estate. If you feel this may apply, please seek further advice from us.
- 4) A Will can be altered or revoked at any time either in full or in part. If your circumstances change, consideration should be given to either making a new Will or amending your existing Will, by means of a Codicil.
- 5) You may like to consider making a Lasting Power of Attorney appointing one or more attorneys to deal with your financial affairs if you are unable or unwilling to do so. For further details please raise this issue in our appointment.

We will be pleased to give advice on any points raised in this questionnaire, so please feel free to ask.