

DECLARATION OF TRUST QUESTIONNAIRE & DATA CAPTURE FORM

Please complete the form below and return this to the Lawyer you are dealing with. The information you provide will be uploaded to our electronic data base. You will **not** be sent marketing information and your data will **not** be sold to a third party. In due course you will be provided with our full Privacy Policy. However, if you wish to see this now, please speak to your Lawyer.

The information you provide will help us to make an initial assessment of your needs and enable us to give you the best advice in light of your circumstances. It may be necessary to have a meeting to discuss the details.

It may be helpful to read the “Declaration of Trust – What Are They?” before you complete this form.

URGENCY – Is there any urgency to have a Declaration of Trust put into place?

Yes (if yes please provide details here)

No

1. ABOUT YOU

Your full name			
		Your date of birth	
		Your telephone number	
		Your email address	
Your full address (including post code)			
Can we send correspondence, including invoices, to this address? <input type="checkbox"/> yes, or <input type="checkbox"/> no			
If no, do you have an alternative correspondence address?			
<input type="checkbox"/> yes (please give address)			
<input type="checkbox"/> no (please give email address on which to receive all correspondence)			

2. THE OTHER PARTIES

	Other party 1	Other party 2 (if applicable – if more than 2 other parties continue on a separate sheet)
Full name (include titles, middle names and any alternative names or aliases that should be recited)		
Full address (including postcode)		

Contact Email		
Relationship to you		

3. THE PROPERTY

Property address <i>(including post code)</i>			
Name of current registered owner(s)			
How do you wish to hold the property? <i>(i.e. percentage interest, fixed amount)</i>	Name: Amount of share/percentage:	Name: Amount of share/percentage:	Name: Amount of share/percentage:
Is there a mortgage in place?	<input type="checkbox"/> yes, or <input type="checkbox"/> no If yes, lender name: If yes, amount of initial mortgage advance: If yes, current mortgage balance:		
Who is going to be contributing to the mortgage repayments going forward?	Contributor: Amount/share:	Contributor: Amount/share:	Contributor: Amount/share:
In what shares are the other outgoings (utilities, council tax etc) going to be met moving forward?	Contributor: Amount/share:	Contributor: Amount/share:	Contributor: Amount/share:
How should each party's interest be protected? <i>(tick one – in the case of percentages, please write your desired percentages).</i>	Fixed sum <input type="checkbox"/> Fixed sum (inflation proofed) <input type="checkbox"/> Percentage <input type="checkbox"/> Percentage or fixed sum (inflation proofed) whichever is the greater <input type="checkbox"/>		

4. CONFIRMATION

Where did you hear of us?

- branch drop-in bus CAB internet leaflet newspaper/magazine
 recommendation/referral other passing by radio sponsorship

I consent to the data provided above being stored by K J Smith Solicitors for the purposes of providing legal advice and assistance.

Signed: **Dated:**

Signed: **Dated:**

Thank you for taking the time to complete this form. Please return it to our team by email to ep&wm@kjsmith.co.uk

Our team will the contact you with the next steps but if you have any questions do not hesitate to contact them on 0118-418-1000.
