

**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**

<b>Your full name</b>			
<b>Your date of birth</b>		<b>Your telephone number</b>	
<b>Your email address</b>			
<b>Your full address (including post code)</b>			
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)
<b>Full name</b> (include titles, middle names and any alternative names or aliases that should be recited)		
<b>Full address</b> (including postcode)		

<b>Contact Email</b>		
<b>Relationship to you</b>		

### 3. THE PROPERTY

<b>Property address</b> <i>(including post code)</i>	
<b>How do you wish to hold the property?</b> <i>(i.e. percentage interest, fixed amount)</i>	

### 4. CONFIRMATION

<p><b>Where did you hear of us?</b></p> <p> <input type="checkbox"/> branch drop-in    <input type="checkbox"/> bus    <input type="checkbox"/> CAB    <input type="checkbox"/> internet    <input type="checkbox"/> leaflet    <input type="checkbox"/> newspaper/magazine  <input type="checkbox"/> recommendation/referral    <input type="checkbox"/> other    <input type="checkbox"/> passing by    <input type="checkbox"/> radio    <input type="checkbox"/> sponsorship </p>
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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:** .....

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

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

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