

WILL QUESTIONNAIRE

URGENCY – Is there any urgency to having your Will(s) prepared (because of travel plans, illness etc)?

Yes (if yes please provide details here)

No

	Client 1	Client 2 (if applicable)
Full name (include courtesy titles and any alternative names or aliases that should be referred to)		
Full address (including postcode)		
Contact Telephone		
Contact Email		
Marital Status <i>(circle as appropriate and give details where relevant)</i>	Married / About to be Married Civil Partner / About to be Civil Partner Separated Widow(er) Divorced / About to be Divorced Single Details/Additional Info:	Married / About to be Married Civil Partner / About to be Civil Partner Separated Widow(er) Divorced / About to be Divorced Single Details/Additional Info:
Gender	Male / Female	Male / Female
Date of birth		
Place of birth		
Maiden or former name(s)		
Nationality		
Where are you resident for income tax purposes?		
Domicile (if non-UK, please give details)		
Occupation		

Details of any medical conditions or medication taken		
If you are divorced, please give details of:	<p>a. Whether or not maintenance is paid and how much; and</p> <p>b. Whether there was a “clean break” barring claims against future inheritances</p>	<p>a. Whether or not maintenance is paid and how much; and</p> <p>b. Whether there was a “clean break” barring claims against future inheritances</p>
Your Children <i>(please include details such as adoption, step-child, whether born in current marriage or previous one, etc)</i>	Name, date of birth, address	Name, date of birth, address
	Name, date of birth, address	Name, date of birth, address
	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:

Previous Will	Date executed:	Date executed:
	Where stored:	Where stored:
	Brief details:	Brief details:
Are you able to read and sign your will?		
Funeral arrangements (cremation/burial, music, location, dress code, scattering of ashes):		
Directions regarding Organ Donation NOTE: To opt out the client must call 0300 123 2323 or fill out an NHS Organ Donor Register withdrawal form Directions regarding Medical Research		
Executor(s) <i>NB: You can appoint someone as sole Executor, you can appoint multiple people as joint Executors or you can appoint a primary Executor, with named substitutes if the primary Executor(s) cannot act. Please include details here of who you wish to include and whether you want them to act solely, jointly or as substitutes.</i>	Surviving Spouse or Partner: [] Sole / Joint / Substitute (Delete as appropriate)	Surviving Spouse or Partner: [] Sole / Joint / Substitute (Delete as appropriate)
	KJ Smith Solicitors: [] Sole / Joint / Substitute (Delete as appropriate)	KJ Smith Solicitors: [] Sole / Joint / Substitute (Delete as appropriate)
	Other (provide details below): []	Other (provide details below): []
	Name: Address: Relationship to you: Sole / Joint / Substitute (Delete as appropriate)	Name: Address: Relationship to you: Sole / Joint / Substitute (Delete as appropriate)
Name: Address: Relationship to you: Sole / Joint / Substitute (Delete as appropriate)	Name: Address: Relationship to you: Sole / Joint / Substitute (Delete as appropriate)	

<p>Guardians for your children (<i>while they are under the age of 18</i>):</p> <p><i>NB: If anyone other than you has parental responsibility for your child(ren) they will automatically act as guardian after your death.</i></p>	<p>Name:</p> <p>Address:</p> <p>Relationship:</p>	<p>Name:</p> <p>Address:</p> <p>Relationship:</p>
<p>Death in Service Benefits, Life Policies & Pension Lump Sums</p> <p><i>* 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.</i></p> <p><i>Please feel free to discuss this further with us.</i></p>	<p>Provider, Amount Due, Whether policy is nominated or written in trust for specific beneficiary*</p>	<p>Provider, Amount Due, Whether nominated or written in trust for specific beneficiary*</p>
<p>Gift of your Home</p> <p><i>Would you like your share of your home to automatically be inherited by the surviving joint-owner or follow the wishes in your will (Sever the Tenancy?)</i></p>		
<p>Specific Gifts (such as ornaments, motor vehicles or jewellery) that you would like to include in your will.</p> <p><i>NB: You may want to complete the Asset Schedule at the end of this form first, to help you in identifying the assets you have and which you may want to include in this section of your will.</i></p>	<p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p>	<p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p> <p>Beneficiary:</p> <p>Item:</p>

<p>Gifts of Money, including gifts to charity that you would like to include in your will.</p> <p><i>NB: You may want to complete the Asset Schedule at the end of this form first, to help you in identifying how much liquid cash you have and therefore what gifts of money might be appropriate for your will.</i></p>	<p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p>	<p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p> <p>Beneficiary:</p> <p>Amount:</p>
<p>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)</p>	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>
	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>
	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>
	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>	<p>Recipient:</p> <p>Date of Gift:</p> <p>Amount:</p>
<p>Are you currently unmarried, but planning or expecting to marry or form a civil partnership in the foreseeable future?</p>		
<p>Do you want your will to cover all of your worldwide assets, or just those in the UK?</p>	<p><input type="checkbox"/> I only have UK assets</p> <p><input type="checkbox"/> I have worldwide assets but I only want my will to cover my UK assets</p> <p><input type="checkbox"/> I have worldwide assets and I want my will to cover my UK assets and my worldwide assets</p>	<p><input type="checkbox"/> I only have UK assets</p> <p><input type="checkbox"/> I have worldwide assets but I only want my will to cover my UK assets</p> <p><input type="checkbox"/> I have worldwide assets and I want my will to cover my UK assets and my worldwide assets</p>

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

Example

Joe Bloggs	10 High Street	On becoming an adult	25%	Yes
John Smith	2 The Lane	Outright	50%	No

Do any of the beneficiaries named in this questionnaire suffer from any mental or physical disability? Such beneficiaries might lose their means-tested benefits if they inherit from you. A Discretionary Trust Will may be the answer.		
No <input type="checkbox"/>	Yes <input type="checkbox"/>	Details:

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.

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 children?

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? We can include a clause in your will to refer to this and try to reduce the chances of such a person succeeding in making a claim against your estate.

No <input type="checkbox"/>	Yes <input type="checkbox"/>	Details:
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Do any of the beneficiaries named in this questionnaire suffer from any mental or physical disability, or are any of them undischarged bankrupts, or 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).

No <input type="checkbox"/>	Yes <input type="checkbox"/>	Details:
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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.