

Wills questionnaire



Have you made a will?

If the answer is no, you could be risking your entire financial estate. A staggering 70% of people have no will, meaning that the law will decide, according to strict rules, who gets your assets - with no guarantee that those family members and friends you wish to give your assets to will be the actual recipients. Please complete the questionnaire below to give us a clear idea of how, and to whom, you wish to allocate your estate before we draw up your will . . .

(PLEASE COMPLETE IN BLOCK CAPITALS)

Please specify which type of Will you require

Single Will

Mirror Wills for a married couple/civil partnership

Mirror Wills for a co-habiting couple

NB References to civil partnerships in these instructions apply to those registered on or after 5 December 2005

1. Personal details

Title: Mr / Mrs / Ms / Other

Occupation:

Surname:

Full postal address:

Full forenames:

Name if known by another name:

Date of birth:

Home tel no:

Town and country of birth:

Daytime tel no:

Email address:

Do you have a current Will?	Y	N
Are you married?	Y	N
Do you own a property?	Y	N
Are you entering into or already in a registered civil partnership?	Y	N
Are you a permanent resident in: England or Wales?	Y	N
Scotland?	Y	N
Northern Ireland?	Y	N
If elsewhere, please state which country		

2. Spouse/partner's details (if applicable)

Title: Mr / Mrs / Ms / Other

Occupation:

Surname:

Full forenames:

Name if known by another name:

Full postal address:

Date of birth:

Home tel no:

Town and country of birth:

Daytime tel no:

3. Dependants

Do you have children under 18? If yes, please insert details	Y	N
--	---	---

Name:	Date of birth:
Name:	Date of birth:
Name:	Date of birth:
Name:	Date of birth:

Do you have a spouse/partner/civil partner/child who you are excluding from your Will? If yes, please give details:	Y	N
Are any close family members being excluded from your Will? If yes, please give details:	Y	N

4. Funeral wishes

Do you have any cremation or burial wishes? If so please give details:	Y	N

5. Executors

Your executors will be responsible for collecting and securing your assets; paying your debts, funeral expenses and tax; and distributing your estate in accordance with the terms of your Will.

A spouse/common law spouse or civil partner will usually appoint each other as executor, along with two other people to act on the death of the survivor. Your children, if over the age of 18, may act. You will need a minimum of two executors if there are minor beneficiaries.

Title: Mr / Mrs / Ms / Other	Relationship:
Surname:	Full postal address:
Full forenames:	
Name if known by another name:	
Date of birth:	Home tel no:
Title: Mr / Mrs / Ms / Other	Relationship:
Surname:	Full postal address:
Full forenames:	
Name if known by another name:	
Date of birth:	Home tel no:

Substitution executor

Title: Mr / Mrs / Ms / Other

Relationship:

Surname:

Full postal address:

Full forenames:

Name if known by another name:

Date of birth:

Home tel no:

6. Guardians (only applicable where there are children under 18 years)

Your guardians will be responsible for bringing up your children. Please specify two guardians and their relationship to you (if any). It is important not to appoint the same people as executors and guardians.

Title: Mr / Mrs / Ms / Other	Occupation:
Surname:	Full postal address:
Full forenames:	
Name if known by another name:	
Date of birth:	
	Home Tel No:
Relationship to you:	
Title: Mr / Mrs / Ms / Other	Occupation:
Surname:	Full postal address:
Full forenames:	
Name if known by another name:	
Date of birth:	
	Home tel no:

Relationship to you:

Substitution guardian

Title: Mr / Mrs / Ms / Other

Occupation:

Surname:

Full postal address:

Full forenames:

Name if known by another name:

Date of birth:

Home tel no:

Relationship to you:

7. Assets/liabilities

To enable us to ascertain if there is any inheritance tax liability, please complete the following:-

Do you own a property?	Y	N
If yes, is the property in your sole name?	Y	N
What is the approximate value of the property?	£	
Is there a mortgage on the property?	Y	N
If yes, approximately how much?	£	
Do you own a property abroad?	Y	N
Do you have: bank/building society accounts? (approx value) £	Y	N
ISAs / savings bonds? £	Y	N
Savings certificates? £	Y	N

Premium bonds?	£	Y	N
Shares?	£	Y	N
Life assurance?	£	Y	N
Pensions?	£	Y	N

8. Gifts/bequests

Please briefly describe any gifts/bequests you wish to make and to whom, e.g.: "I give my stamp collection to Joe Bloggs" or "I give the sum of £500 to my grandson, James Smith"

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Pecuniary legacies

Pecuniary legacies (free of taxes), e.g.: "I give the sum of £500 to my grandson, James Smith"

1.
2.
3.
4.

If a gift is to a child, at what age should s/he receive it?

18 21 25

Property

Property to pass to surviving spouse/common law spouse or civil partner/children/grandchildren etc.
(see notes)

1.

2.

3.

4.

If a gift is to a child, at what age should s/he receive it?

18

21

25

Residue estate

Residue to pass to surviving spouse/common law spouse or civil partner/children/grandchildren etc. After the payment of your debts as well as funeral and other expenses, the remainder is referred to as 'Residue' Estate. It is important to note that assets held in joint names will pass to the surviving joint owner, irrespective of what is stated in the will.

1.

2.

3.

4.

If a gift is to a child, at what age should s/he receive it?

18

21

25

Substitution beneficiaries

In the event of your beneficiaries predeceasing, substitute beneficiaries will take their place.

1.

2.

3.

4.

If a gift is to a child, at what age should he or she receive it?

- 18 21 25

Children/grandchildren

Names, dates of birth, addresses.

Notes

How did you learn about Guardian Solicitors

Internet	Recommendation
Existing client	Estate agent
Business to business referral	Other:

Declaration

Please ensure this declaration is completed, signed and then returned to Solicitors Ltd.

Please prepare a Will for me based on the instructions contained in this form.

This was completed by myself or

I understand that:

- The information requested in this form is needed to prepare my Will and to ensure the Will reflects my wishes.
- The information is being used by Guardian Solicitors, which is responsible for preparing my Will.
- Guardian Solicitors may contact me to confirm my instructions.
- Information about me will be put on the Guardian Solicitors database and used by Guardian Solicitors to service my relationship with them and monitor service levels and Guardian Solicitors professional partners.
- Guardian Solicitors can be an executor on my death and a charge clause can be inserted for administration fees.

I certify that the information given in this form is true and complete and correctly represents my wishes.

Please note:

- There will be an additional charge after your Will has been prepared, should you alter your wishes and thus require Guardian Solicitors to re-draft your Will. You need to check carefully that this form does reflect your wishes and nothing has been left out.
- Guardian Solicitors reserves the right to make an additional charge if the nature of your instructions requires more time than Guardian Solicitors considers reasonable for preparing your Will. You will be advised of the estimated additional charge before any work is undertaken.

- Your details are held by Guardian Solicitors, which is the data controller.
- You have right of access to your personal records held on our files by written request to Guardian Solicitors and on payment of a fee.

Keeping you informed

Guardian Solicitors may use the information on this form to provide you with details of selected products and services by post or phone. If you do not want this, please tick this box

By providing your e-mail and/or mobile telephone number below, you are agreeing to receive offers or communications by e-mail and/or mobile/SMS from Guardian Solicitors.

E-mail Address:

Mobile Tel No:

Signed:

Signed:

Date:

Date:

1st Signature

2nd Signature

USEFUL INFORMATION

INHERITANCE TAX LIABILITY

After considering how much your own estate may be worth, you may need advice on inheritance tax planning.

If you are single and die with an estate worth more than £325,000 (including money, property and investments, but after deducting debts and expenses such as funeral costs and mortgages), 40% tax will become due on anything above the allowance (nil rate band)

Please note that the inheritance tax allowance has been frozen for this term of Parliament.

Married couples and civil partners are allowed to pass their assets to each other tax-free and the surviving partner can use both tax-free allowances on his/her death (provided one allowance was not used at the first death). Thus the inheritance tax allowance on the second death may potentially total £650,000.

From 2017, the allowance will increase so that by the end of 2021, married couples with children will have an allowance of £500,000 each. [<https://www.gov.uk/government/publications/inheritance-tax-main-residence-nil-rate-band-and-the-existing-nil-rate-band/inheritance-tax-main-residence-nil-rate-band-and-the-existing-nil-rate-band>]

DIVORCE (after a Will)

On divorce, gifts to your husband/wife in an existing Will are cancelled and so is the appointment of your spouse as executor, but the rest of your Will still stands. This can create problems and it is best to make a new Will.

MARRIAGE (after a Will)

A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately or make sure your new Will takes into account any forthcoming marriage.

CLAIMS AGAINST YOUR ESTATE

If you make no provision for a husband/wife/partner or an ex-husband/wife/partner, s/he may make a claim against your estate. If this applies to you, please seek further advice from us at your appointment.

Similarly, if you are paying or have been ordered to pay maintenance for any minor or dependant children, you will need to ensure that they are suitably provided for in your Will or they too may have a claim against your estate.

SECOND MARRIAGES (and children of previous relationships)

If you marry for a second time and have children from a previous relationship, you must consider if you wish your own children to benefit from your estate on your death even though your spouse survives you. You could, for example, give your spouse the right to live in your house until s/he dies but on their death your share goes to your own children.

EXECUTORS

The role of an executor is to act on behalf of the estate, and thus fulfil all the obligations of an executor in making an application for a Grant of Probate. The executor will be responsible for administration of the estate. The executor's role is voluntary and executor(s) can be a beneficiary to the estate. In some cases it may be best to appoint more than one executor.

This is not an exhaustive checklist. Guardian Solicitors will advise you fully and handle any queries when we meet. Please call us on 0203 301 6600 or email info@GuardianSolicitors.co.uk