

# WILL QUESTIONNAIRE

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		
Mr / Mrs / Ms / Other		
Surname		
Full forenames		
Name if known by another name		
Date of birth		
Town and country of birth		
Occupation		
Address		
	Postcode	
Home tel no		
Daytime tel no		
Email address		

Do you have a current Will?	Y	N
Are you married	Y	N
Do you own 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)

Mr / Mrs / Ms / Other
Surname
Full forenames

Name if known by another name	
Date of birth	
Town and country of birth	
Occupation	
Address	
	Postcode
Home tel no	
Daytime tel no	

### 3. Dependants

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

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.

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Address

Postcode

Home tel no

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Address

Postcode

Home tel no

#### Substitution executor

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Address

Postcode

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

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.

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Occupation

Address

Postcode

Home tel no

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Occupation

Address

Postcode

Home tel no

#### Substitution guardian

Mr / Mrs / Ms / Other

Surname

Full forenames

Name if known by another name

Date of birth

Relationship to you

Occupation

Address

Postcode

Home tel no

## 7. Personal Assets and Liabilities

Personal Assets	Self			Spouse/Partner		
	Yes	No	Value	Yes	No	Value
Main Residence			£			£
Second Property			£			£
House contents and personal effects			£			£
Quoted stocks and shares			£			£
Unit or investment trusts			£			£
Life Policies			£			£
Pension Policies			£			£
Building Society, National Savings and Bank Deposit accounts			£			£
Any other assets (e.g. Trust Income)			£			£
Bank current account(s)			£			£
<b>Total</b>			£			£

Personal Liabilities	Self			Spouse/Partner		
	Yes	No	Amount	Yes	No	Amount
Mortgage(s)			£			£
Bank Overdraft			£			£
Personal Bank Loans			£			£
Hire Purchase Liabilities			£			£
Credit Card Balances			£			£
Any other Liabilities			£			£
<b>Total</b>			£			£

What type of mortgage do you have?  
(Repayment, Endowment, Pension)

Is the mortgage repaid in the event of death of self  
or spouse/partner

### Notes


### 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.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

### 9. 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

### 10. 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

### 11. Residue estate

The remainder of your Estate after the payment of your debts funeral expenses, the costs of the administration and possible Inheritance Tax will form part of the Residue Estate. This can simple pass to surviving spouse/common law spouse or civil partner/children/grandchildren in equal shares.

- 1.
- 2.
- 3.
- 4.

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

18     21     25

### 12. Substitution beneficiaries

In the event of your proposed Residuary beneficiaries not being alive, you can make provisions for substitute beneficiaries.

- 1.
- 2.
- 3.
- 4.

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

18     21     25

### 13. Dependents (Children, Grandchildren, etc.)

	Dependents Name	Relationship	Date of birth
1.			
2.			
3.			
4.			
5.			



## Declaration

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

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

This was completed by myself

Of .....

### 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 your 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 ..... Date .....  
(1st signature)

Signed ..... Date .....

#### Guardian Solicitors

Salisbury House, 81 High Street, Potters Bar, Herts, EN6 5AS  
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## Useful information

### Inheritance Tax liability

Inheritance Tax is usually paid on an estate when somebody dies. It's also sometimes payable on trusts or gifts made during someone's lifetime. Most estates don't have to pay Inheritance Tax because they're valued at less than the threshold (£325,000 in 2014 to 15). The tax is payable at 40% on the amount over this threshold or 36% if the estate qualifies for a reduced rate as a result of a charitable donation.

### Increased threshold for married couples and civil partners

Since October 2007, married couples and registered civil partners can effectively increase the threshold on their estate when the second partner dies – to as much as £650,000 in 2014 to 2015. Their executors or personal representatives must transfer the first spouse or civil partner's unused Inheritance Tax threshold or 'nil rate band' to the second spouse or civil partner when they die.

### Inheritance Tax exemptions and reliefs

Sometimes, even if your estate is over the threshold, you can pass on assets without having to pay Inheritance Tax. Examples include:

- **Spouse or civil partner exemption.** Your estate usually doesn't owe Inheritance Tax on anything you leave to a spouse or civil partner who has their permanent home in the UK – nor on gifts do you make to them in your lifetime – even if the amount is over the threshold.
- **Charity exemption.** Any gifts you make to a 'qualifying' charity – during your lifetime or in your will – will be exempt from Inheritance Tax. A donation to charity in your will may also reduce the rate that tax is paid at (see more in the link below).
- **Potentially exempt transfers.** If you survive for 7 years after making a gift to someone, the gift is generally exempt from Inheritance Tax, no matter what the value.
- **Annual exemption.** You can give up to £3,000 away each year, either as a single gift or as several gifts adding up to that amount – you can also use your unused allowance from the previous year but you use the current year's allowance first.
- **Small gift exemption.** You can make small gifts of up to £250 to as many individuals as you like tax-free.
- **Wedding and civil partnership gifts.** Gifts to someone getting married or registering a civil partnership are exempt up to a certain amount.
- **Business, Woodland, Heritage and Farm Relief.** If the deceased owned a business, farm, woodland or National Heritage property, some relief from Inheritance Tax may be available.

### 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. We will advise you fully and handle any queries when we meet.**

### Guardian Solicitors

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[www.guardiansolicitors.com](http://www.guardiansolicitors.com)



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