
WILL QUESTIONNAIRE

To assist us in drafting your Will it would be helpful if you could complete this questionnaire. It is not essential to do so, but we find that it is a very useful exercise.

If you require any assistance with it, we are more than happy to help you. Please return by email to rob@rklaw.co.uk or post it to Rob Kellock Solicitor, PO Box 1408, Preston PR2 0XZ.

Please continue on a separate sheet should you need more space.

YOUR DETAILS

Full name (inc. title)	
Other names you are known by	
Your address, inc. postcode	
Date of birth	
Telephone number (s)	Mobile: Home: Work:
E-mail address	
Domestic status e.g. married, widowed	
Date of marriage/ civil partnership	

YOUR PARTNER'S/SPOUSE'S DETAILS

Partner/spouse full name (inc. title)	
Other names they are known by/or previously known by	
Address, inc. postcode (if different to yours)	
Date of birth	

YOUR EX SPOUSE/PARTNER DETAILS (if applicable)

Ex-Partner/spouse full name (inc. title)	
Date of birth	
Date of divorce/dissolution (if applicable)	

YOUR CHILDREN

Child's full name	Address, including postcode	Date of birth

YOUR GRANDCHILDREN

Grandchild's full name	Address, including postcode	Date of birth

ADDITIONAL FAMILY MEMBERS (E.g. step-children)

Full name	Their relationship to you	Address, including postcode	Date of birth

POTENTIAL CHALLENGES TO YOUR WILL

Are you aware of anyone likely to challenge your Will. For example, a former spouse?

Full name	
Reason for potentially challenging your Will	

THE ADMINISTRATION OF YOUR ESTATE

EXISTING WILL

Have you already made a Will?	YES/NO
If so, where is it kept?	

EXECUTORS

Who would you like to appoint as your Executors? (The people responsible for administering your estate and carrying out the instructions of your Will. Appoint people who you trust to comply with your wishes. (If a spouse or partner is chosen as a sole executor, others should be appointed as back up in case they are unable to act). Executors are also appointed as Trustees which may involve long term management e.g. looking after money for minor or disabled children. You can appoint up to four individuals. Couples often appoint one another as sole executors for one another, but it is recommended that at least two are appointed as back up.

PLEASE NOTE: Beneficiaries can be and often are Executors.

	Executor 1	Executor 2
Name		
Address, inc. postcode		

GUARDIANSHIP

If you have children under the age of 18 years old, who would you want to appoint as Guardian/Guardians in the event both parents have passed away? Guardians assume the day to day responsibility for the children until they reach the age of 18.

	Guardian 1	Guardian 2
Name		
Address, inc. postcode		

YOUR FUNERAL WISHES

<p>Please note any specific wishes you have e.g. cremation/burial/environmental burial</p>

GIFTS OF PERSONAL POSSESSIONS

Are there any gifts or items of property you would like to specify in your Will? Include details of any family heirloom or jewellery.

Item description	Beneficiary full name	Beneficiary's address inc. postcode

CASH GIFTS/LEGACIES

Do you wish to leave any specific amounts of money to anyone? Perhaps a family member, friends or Charity? Please note that gifts of money to charity are exempt from inheritance tax.

Item description	Beneficiary full name	Beneficiary's address inc. postcode

YOUR REMAINING ESTATE

After payments of debts and legacies, who would you like the remainder of your estate to go to?

Please note special thought must be given to your spouse – including if separated but not yet divorced – children from both former & current relationships and any other dependants – such as cohabittees. If you fail to make provision for any of those persons named above this may result in a claim being made against your estate.

Beneficiary(ies) of remaining estate

Beneficiary name	Beneficiary address inc. postcode	Their relationship to you

DEATH OF A BENEFICIARY

If any of the people you wish to inherit from you die within your lifetime, who do you wish to benefit instead?

Name of existing Beneficiary	Name of person you wish to benefit instead	Address inc. postcode of person you wish to benefit instead	Their relationship to you

If any of the beneficiaries of your Will are your children, at what age would you wish them to inherit? They will inherit at 18 unless you specify otherwise:

Age at what do you wish your children to inherit?	
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Please note: If you wish your estate to remain in trust after your children/grandchildren reach the age of 18 it will be required to be managed which may incur costs and tax and possible exit charges. We will advise on this should you so wish.

In the unfortunate event of one of your children dying during your lifetime, how would you wish any share of your estate that they would have inherited had they survived you to be distributed?

For example, to remaining children or to pass to grandchildren?

I wish for their share of the estate to go to:

DETAILS OF YOUR ESTATE

Please give details of your estate. It helps us to consider the appropriateness of the Will and advise you on any tax implications.

PRINCIPAL RESIDENCE

Is this property owned or rented?	
If owned, approximate value of the whole property:	
Outstanding mortgage (if applicable)	
Is the property jointly owned?	
Do you have a second home?	

BANK ACCOUNTS

Bank name	Joint/Sole account

SAVING ACCOUNTS

Bank name	Joint/Sole account

VALUABLES

Item	Value if known

PENSION(S)

Company name	

LIFE POLICIES

Company name	

BUSINESS ASSETS

Please give details of any business assets you own

OTHER FINANCIAL INTERESTS

Please give details of any other financial interests you have

OTHER

Have you made any gifts exceeding £3,000 in the last 7 years?	
Do you own any foreign property? If yes, please provide details.	
Do you wish to receive information about Lasting Powers of Attorney?	
Do you require any independent financial advice on assets and saving?	
Do you require advice of Inheritance Tax planning?	

If you have any questions or require assistance completing this questionnaire please contact us on 01772 612576, or on 07767 471063 or by email at rob@rklaw.co.uk

General Important Notes – Please Read

Illegitimate and adopted children (but not step-children) generally have the same rights of inheritance as other children.

Excluded children, partners, ex-spouses or ex-partners or other beneficiaries may have a right to claim a share of your estate on your death – please ask us if you think this may be a consideration.

Property owned as joint tenants tends to pass automatically to the remaining owner(s) and cannot otherwise be disposed of by a Will. Please ask us if you are not sure how you own your property.

Foreign assets can attract different inheritance and tax rules and regulations. Please contact us to discuss.

Funeral wishes cannot be enforced, only expressed. Please discuss such wishes with your family. If you wish to leave your body to medical science, please discuss with your family and GP.

Guardianship normally only becomes effective once both parents are dead and any of your children are under 18. This may be different if you are a single parent or if a Local Authority or Court becomes involved. Please contact us to discuss if necessary.

The post of Executor/Trustee and Guardian can be an important, onerous post that carries a lot of responsibility. You should ensure that people appointed agree to this in advance and are people who you know and trust to carry out your wishes to the best of their ability.

If you sell or replace any articles specifically given away in your Will, that intended beneficiary will not receive a replacement or money equivalent and will get nothing.

If you have insufficient cash funds, after payment of estate debts, to satisfy gifts of money, these gifts will normally be given on a pro-rata basis to each beneficiary.

All gifts in your Will will be subject to any tax applicable and in force in the United Kingdom unless you specifically exclude such liability within the terms of your Will to the extent that such is allowed under legislation in force at the time of your death.

A Will is automatically revoked and void if you marry after making it (unless it contains a contemplation of marriage clause).

On a divorce after making a Will, any gifts or appointments to, and of, that divorced partner will be void, although the remainder of the Will may be valid.

The information requested in this questionnaire is based on the law in England & Wales in force at the time of drafting this questionnaire. No liability is accepted for changes to the law which, based on the details requested and the responses given in this questionnaire, we have no reason to believe would apply to your circumstances.

The intended author of the Will should complete this questionnaire. We cannot accept responsibility, for unknown or unauthorised third party intervention.

We would advise you to have a new Will drafted following any change in personal circumstances. Please contact us to discuss if necessary.

Whilst every care has been taken in compiling this questionnaire, we are not liable for any reliance you place on such.

If your estate is over £325,000 – then discuss the possibility of incorporating Inheritance Tax savings provisions in your Will with us. Our standard fee does not include IHT advice/planning in detail.