

CONFIDENTIAL

Wills Questionnaire

APPENDIX 1

Subject matter	Client Will requirements
Names What is your legal name, full postal address and date of birth. If you prefer to go by another name or are known as such please indicate this?	Legal Name: Full Address: Date of Birth:
Marital/ Civil Partnership status What is your current marital or civil partnership status?	Name of spouse/ civil partner: Date of marriage/ civil partnership:
Marriage Are you preparing a Will in contemplation of marriage? NB: Marriage revokes a previous Will unless your Will is made in contemplation of that forthcoming marriage?	
Executors/Trustees Who do you wish to appoint as your Executors/ Trustees of your Will. Please provide their full names and addresses? We normally suggest at 2 executors/trustees It is advisable to consider appointing substitute Executor(s)/ Trustee(s) in the event that your chosen Executor(s) / Trustees(s) are unable or unwilling to act.	Primary Executor(s)/Trustee(s) 1.Name 1.Address Substitute Executor(s)/ Trustee(s) Name: Address:

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Guardians If you have minor children (i.e. under the age of 18) who do you wish to appoint as their legal guardians? The guardian will act as your child(ren)'s legal representative on the death of the second parent. It is good practice to have a backup! Who would that be?	Primary Guardian(s) 1.Name 1.Address Substitute Guardian(s) 2.Name 2.Address	
Children (Include Children from any previous relationships, Step children & Estranged Children) Please provide the full names and dates of birth of your children.	Name and Address:	DOB:
Other Dependents Are there any other individuals who are financially dependent upon you or whom you wish to provide for under your Will?	If yes, please provide the following: Name: Relationship to you: Details of your wishes:	

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Mutual Will Do you wish to create mutual wills with another individual e.g. your spouse? This creates a legal obligation on the surviving individual to honour the wills made in your lifetime. Note: This is useful if situations where for example the surviving spouse might remarry or be unduly influenced to change their Will after the death of their spouse.	
IHT Nil Rate Band Discretionary Will Trust (NRT) Do you wish to discuss whether an IHT Nil Rate Band Discretionary Trust may be appropriate for inclusion in your Will? <i>Note: An IHT Nil Rate Band Discretionary Will Trust is a trust created under a Will to receive assets up to the deceased's available inheritance tax nil-rate band. The assets are held by trustees for potential beneficiaries chosen within a defined class, helping preserve the nil-rate band and potentially reduce IHT on the survivor's later death.</i> Residential Nil-Rate Bands are not available where assets are not passed directly to dependents.	If yes, who would you wish to be considered as potential beneficiaries of the trust? Name: Relationship: Name: Relationship: Name: Relationship:
Business Relief and the NRT Do you own any business interests, agricultural property or other assets which you believe may qualify for Business Relief ("BR") (formerly known as Business Property Relief) and which you would like us to consider in relation to any Nil Rate Band Discretionary Trust?	If yes, please provide details.

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Specific Legacies Personal household items? Do you wish these to be left to a specific individual (s) if you predecease them? Specific gifts: What specific gifts (if any) do you wish to leave to beneficiaries? This may include cash, property, investments, shares or other assets. The beneficiaries can be residue beneficiaries (see below). Do you wish that the IHT payable on these gifts is paid out of residue so that the beneficiary receives the gift gross of IHT?	
Joint property Do you have any property or other significant assets held in joint names, other than your home e.g. share holdings, bank account? Any jointly held property/ assets will pass automatically to the joint owner(s) regardless of how you propose to gift it in your Will.	
Tenancy in Common Do you own a property as tenants in common with another individual(s)? Do you want that individual(s) to have the unfettered right to carry on owning/living in that property if you predecease them?	
1. Residuary Beneficiaries Who do you wish to benefit from the remainder (residue) of your estate after all other gifts, debts, expenses and payment of IHT have been dealt with? Normally most people want their surviving spouse/civil partner to inherit all their assets. If this is the case please enter your spouse's name in the box on the right.	

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2. Residuary Beneficiaries In the event that you do not wish for your spouse/civil partner to be the primary beneficiary or they do not survive you who do you wish to benefit from the remainder (residue) of your estate after all other gifts, debts, expenses and payment of IHT have been dealt with.?	Beneficiary (ies): %/shares:
3. Gift over (if residuary gifts fail) Who is to benefit in the event that a gift to one or more of your residuary beneficiaries fail? Individuals, charities, and or political parties. Remember certain gifts e.g. to charities are exempt from IHT.	Beneficiary: Relationship:
Foreign Wills/ Overseas Assets If you have overseas assets e.g. foreign property, you should take advice in the Country/Jurisdiction where the property is located to consider the tax implications? You should also execute a Will in the Country/Jurisdiction where you own foreign property.	
Pensions and Life Assurance Do you have any pension arrangements or life assurance policies which provide benefits on death? Have you made a nomination or expression of wishes in respect of these benefits i.e. nominated beneficiaries. If yes, does the nomination or expression of wish reflect your current wishes?	Yes ☐ No ☐ Yes ☐ No ☐ Yes ☐ No ☐

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Funeral Please advise of the following:- 1. Burial; or 2. Cremation Ceremony 1. Simple; or 2. Moderate; or 3. Lavish Flowers 1. Yes; or 2. No – gifts to charity instead; and if NO your chosen charity	
Digital Assets Do you have any significant digital assets or online accounts which your Executors may need to identify or access following your death? Please provide brief details if relevant. <i>Please do not provide passwords or security credentials in this questionnaire.</i>	Yes ☐ No ☐
Donations to Charities Are there any specific donations you would like to make to charity following your death? Note: if you donate 10% or more of the value of your estate to a registered charity, the IHT applied on your taxable estate drops from 40% to 36%.	Charity(ies): Gift amount:

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Any other matters Do you wish to leave specific instructions as to what should happen to your body, e.g. body/organ donation, looking after pets?	