

**POOLEYS SOLICITORS
CLIENT WILL QUESTIONNAIRE**

Please complete this as fully as possible. We will discuss your wishes and then prepare your Will ready for you to sign.

1. YOUR DETAILS (please insert both of your names if mirror Wills are required)

FULL NAME(S)		EMAIL ADDRESS	
ADDRESS		OCCUPATION(S)	
POSTCODE			
If joint Wills required Relationship to each other?	DATES OF BIRTH	TELEPHONE NUMBERS	

2. For a single Will only - YOUR HUSBAND/WIFE/PARTNER (please delete as appropriate)

FULL NAME		MAIDEN NAME/ALIAS(S)	
ADDRESS		OCCUPATION	
POSTCODE	DATE OF BIRTH	TELEPHONE NUMBERS	

If applicable, do you plan to marry in the future? Please see **note 1** YES/NO

3. FORMER MARRIAGE DETAILS

Have (either of you) been married before? Please see **notes 2 & 3** YOU SPOUSE

If so, what is the full name of the former Spouse? Date of Decree Absolute:

4. YOUR CHILDREN AND DEPENDANTS – Please continue on a separate page if necessary. Please see notes 3 and 4. If any of the children named below are **not** your **biological** children, please specify the relationship, e.g. adopted, fostered/step-child

FULL NAME	RELATIONSHIP	FULL NAME	RELATIONSHIP
ADDRESS		ADDRESS	
POSTCODE		POSTCODE	
DATES OF BIRTH	AGE	DATES OF BIRTH	AGE

FULL NAME	RELATIONSHIP	FULL NAME	RELATIONSHIP
ADDRESS		ADDRESS	
POSTCODE		POSTCODE	
DATES OF BIRTH	AGE	DATES OF BIRTH	AGE

5. GUARDIANS - Please state who you would like to be the Guardian(s) of your children if they are under the age of 17. Please see **note 5**

FULL NAME	FULL NAME
ADDRESS	ADDRESS
RELATIONSHIP	RELATIONSHIP

6. FUNERAL WISHES – Do you wish to be cremated / buried / no preference (please delete as appropriate) It is important that you tell your family or friends of your preferences. Your Will should not be the only source of information.

7. EXECUTORS & TRUSTEES (i.e. those who will administer your Estate(s) on death)

If you require joint Wills, please tick this box if you wish the survivor of you to be the sole Executor on the first death and then detail others to be appointed on the second death below – we recommend that the survivor should have at least two Executors.

Would you like the partners of this firm also to act as Executor(s) enabling professional support and advice? YES NO

Please indicate your choice of Executors below:

FULL NAME	FULL NAME
ADDRESS	ADDRESS
RELATIONSHIP	RELATIONSHIP

8. LEGACIES / GIFTS – Please continue on a separate page if necessary

Please give details of the persons whom you wish to leave cash or specific items and provide details of the article. Please note that if you sell or replace one of these items the named person will get nothing; that person will not be given a substituted item or the cash equivalent, unless you make a special provision in your Will.

Greater flexibility is usually obtained by dealing with specific items in a letter to be attached to your Will of you prefer.

Name		Name	
Address		Address	
Relationship	Age if under 18	Relationship	Age if under 18
Article/cash amount	Age at which they receive? 18/21/25	Article/cash amount	Age at which They receive? 18/21/25

In the case of joint Wills – unless you tell us otherwise we will assume that the specific gifts and legacies are to be given after the second death YES/NO

9. THE RESIDUE (i.e. the remainder of your Assets after the Legacies/Gifts mentioned above)

This is all that you own **except** property nominated or written in trust and the gifts made listed at point 8 above and jointly owned property (which passes to the surviving co-owner(s) in any event – see note 6). Please state below who is to receive the residue on your death, and who is to receive it if all of them die before you.

The following are examples of the more common provisions made. If you wish to use one of these, tick the appropriate box and also (d), if the recipient is under 25, otherwise go to (e)

(a) Everything to my spouse/partner named above, but if they have died then to my children, named at question 4 equally and if any of them has died to their children equally. **Please go to (d)**

OR

(b) Everything to my children, named at question 4, equally and if any of them has died to their children equally. **Please go to (d)**

(c) to my spouse/partner named above, but if they have died before me to the person(s)/ organisation(s) named in (e) below

AND IN ALL CASES

(d) Please specify the age at which your children or grandchildren will receive their entitlement. Commonly chosen ages are 18, 21 or 25

(e) **Alternatively, (and to cover the situation where everyone mentioned in (a) (b) and (c) already died)** please set out who is to receive the residue (and if under 18 their age); if more than one person or organisation is involved, please define shares? Continue on a separate page if necessary

FULL NAME	FULL NAME
ADDRESS	ADDRESS
RELATIONSHIP	RELATIONSHIP
SHARE (%or £)	AGE
	SHARE (% or £)
	AGE

10. YOUR ASSETS –continue on a separate page if necessary

Please give an estimated value of your total assets. The aim of this section is to give us an idea of the size of your (respective) estate(s) so that we can point out any either:

- (a) potential Inheritance Tax savings OR
- (b) scope for protection of some assets against care costs

Current value of your home/other properties. £

- Is it held by you alone? YES/NO Land Registry No – if known
- If in shared ownership is it held as JOINT/COMMON/DON'T KNOW Please see **note 6**
- Amount of any mortgage outstanding; will it be paid off by insurance on first death YES/NO or on second death YES/NO

- Personal belongings/household effects £
- Savings and investments £
- Loans/debts owing to you £
- Life/Endowment Policies/Pensions £
(please specify if any have been nominated or written in trust)
- Do you have a business? YES/NO
If so, please give details and value of your share £
- Do you own property outside England & Wales? YES/NO
If so, please give details
- Are you or your Partner/spouse domiciled abroad? YES/NO
If so please give details

- Do you have a foreign Will? YES/NO
If so please give details
- Are you or your partner/spouse entitled to benefit from any assets held in trust YES/NO

11. INHERITANCE TAX/FINANCIAL ADVICE

Would you like us to provide separate Inheritance Tax advice? YES/NO

This advice may attract an additional charge, but the advice could enable your heirs to save a substantial sum of money, rather than paying 40% tax on it.

Wills and lifetime financial planning go hand in hand – have you considered whether the assets you hold give the best return and spread? If not we may be able to recommend further advice, sources of e.g. stockbrokers, financial planners or financial advisers YES/NO

GENERAL NOTES FOR YOUR INFORMATION

1. Marriage almost always completely cancels any previous Will.
A final decree (decree absolute) of divorce automatically cancels any gift to your former spouse whose appointment as Executor is also cancelled; the rest of the Will stands. This can create problems and it is better to make a new Will following divorce – probably before decree absolute.
2. If you are not making any provision for a spouse/partner/child or a former spouse/partner, it is possible that they could make a claim against your estate on your death. If this might apply to you, please seek further advice from us.
3. Unless you specify otherwise a reference in your Will to “my children” will cover Illegitimate and adopted children (but not step-children) who generally have the same rights of inheritance as natural children if you refer to ‘my children’ in your Will. Step-children are not included in the description “children”; if step-children are to benefit the reference must be specific.
4. Should a child of yours die in your lifetime leaving children who are your grandchildren, then the benefits given by your Will to your deceased child will pass automatically to those grandchildren, unless you say otherwise in your Will.
5. The appointment of Guardians will usually only apply if you and the child’s natural parent are both dead. The position may be different if you are a single parent and this area may need further discussion. Guardianship involved a lot of responsibility and you should ask people to agree to act before appointing them.
6. Jointly owned property passes automatically to the survivor (s) on death and cannot be given away by a Will. However, if you hold property as ‘joint tenants’ (usually married couples do) then you are able to ‘sever’ the joint tenancy thus altering the basis of ownership “in common”; you can then leave your 50% share under your Will – which may be to someone other than the other co-owner.

SIGNED DATE200.

SIGNED DATE200.

IF YOU ARE A NEW CLIENT WE WOULD BE GLAD TO KNOW WHY YOU HAVE COME TO POOLEYS SOLICITORS

What is the main reason for instructing this firm in particular (i.e. you have used us before or advertising or through recommendation) ?