

WILL QUESTIONNAIRE (COUPLE) All information will be treated in the strictest confidence

Client 1

Client 2

YOUR PERSONAL DETAILS

Details Required

1.	Title		
	Full name		
2.	Full address <i>Including postcode</i>		
3.	Date of birth		
4.	Telephone number(s)		
5.	Marital status <i>Please tick appropriate box(es)</i>		
	<input type="checkbox"/> Single	<input type="checkbox"/> Single	
	<input type="checkbox"/> Married	<input type="checkbox"/> Married	
	<input type="checkbox"/> Separated	<input type="checkbox"/> Separated	
	<input type="checkbox"/> Divorce	<input type="checkbox"/> Divorce	
	<input type="checkbox"/> Widowed	<input type="checkbox"/> Widowed	
	<input type="checkbox"/> Partner/common law spouse	<input type="checkbox"/> Partner/common law spouse	
6.	If married, date of marriage		

Divorce or Remarriage

Generally divorce treats a former spouse as if he or she had predeceased you so that no gift will pass to them nor can they act as executors even if named as such. In other respects, however, the rest of the Will, remains valid.

If you have made a Will and then marry or remarry, the Will may be cancelled and the rules of intestacy would apply. However, a valid Will can be made taking into account a planned marriage **or remarriage** which you should indicate below if appropriate.

7. Notwithstanding the above, do you have any financial dependants whom you do not wish to benefit under your Will (e.g. spouse, former spouse or partner or children)?

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If yes, we will be pleased to advise you.

8. Do you intend to marry/re-marry in the near future?

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9. Would you like your new Will to take this into account?

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Client 1

Client 2

10. Is your permanent home in England or Wales?
If not, please state which country

11. Is your ability to read and sign your Will affected by any condition?
If yes please supply details.

INFORMATION ABOUT YOUR CHILDREN

12. Details Required

Give the full names and dates of birth of any children you have.

Please indicate the gender of your child.

Children from your present relationship

Child 1		Child 2	
Gender		Gender	
DOB		DOB	
Child 3		Child 4	
Gender		Gender	
DOB		DOB	

13.

Children from previous relationship

Child 1		Child 1	
Gender		Gender	
DOB		DOB	
Child 2		Child 2	
Gender		Gender	
DOB		DOB	
Child 3		Child 3	
Gender		Gender	
DOB		DOB	
Child 4		Child 4	
Gender		Gender	
DOB		DOB	

Please add more if required:

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APPOINTMENT OF EXECUTORS

Executors are persons whom you appoint in your Will to carry out your wishes and administer your Estate: You may consider appointing a relative or close friend with additional or substitute executors. This is a responsible position with some duties imposed by law and you may therefore consider appointing a professional executor such as a solicitor. As a firm, we would be pleased to accept an appointment solely or with other persons and can offer full services for the efficient administration of your estate. An Executor can be a beneficiary under your Will.

14. Whom do you wish to appoint as executor(s)?

Please tick the appropriate box from the following statements:

Give the full names and addresses of all persons named below. Please state their relationship to you. (i.e my sister, brother-in-law, friend etc.)

☐ I wish to appoint the person(s) named below to act as my Executor(s)

☐ I wish to appoint the person(s) named below to act as my Executor(s)

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☐ I wish to appoint the person(s) Named below with THOMAS FLAVELL & SONS

☐ I wish to appoint the person(s) Named below with THOMAS FLAVELL & SONS

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☐ I wish to appoint THOMAS FLAVELL & SONS

☐ I wish to appoint THOMAS FLAVELL & SONS

YOUR ASSETS

15. Do you hold any assets outside England and Wales? If so, please give full details including where situated.

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UK ASSETS

Some Assets may fall outside your Will:

- **Pension fund trustees** usually have discretion to distribute the pension scheme death benefits and your wishes should be notified to the trustees. Similar consideration may apply to death in service schemes.
- The proceeds of a life assurance policy written in trust are payable to the person name.
- Jointly owned assets may pass to the surviving owner(s)

16.

Details	Client 1 Assets	Client 2 Assets	Joint Assets
Land & Property	£	£	£
Furniture	£	£	£
Personal Effects	£	£	£
Motor cars	£	£	£
Bank Account	£	£	£
Building society accounts	£	£	£
National savings	£	£	£
Stocks & shares	£	£	£
Personal Equity Plans	£	£	£
Tessa's	£	£	£
Life Assurance	£	£	£
Superannuation Benefits	£	£	£
Interest in another estate or trust	£	£	£
Cash	£	£	£
Other Assets	£	£	£
TOTAL	£	£	£
LIABILITIES	Client 1	Client 2	Joint liabilities
Mortgage outstanding	£	£	£
Credit cards	£	£	£
Other	£	£	£
	£	£	£
TOTAL	£	£	£
NET ASSETS / LIABILITIES (Assets less liabilities)	£	£	£

17.

Please specify if, in the last 7 years, you have made any gifts of sums of money or property the total value of which exceeded £3,000 in any one tax year.

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18.

Do you wish to leave your body for medical research?		
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19.	If yes, do wish to donate all your body?		
20.	If no, please specify which parts of your body you wish to donate.		
21.	Is it your wish to be buried or cremated?		

Appointment of Guardians (if you have children)

If you have any children under the age of 18, you should consider appointing at least one guardian. When one parent dies, the surviving parent normally becomes the legal guardian, but it is of course possible the both parents may die together or you may be a single parent. Where a man is not married to the mother to the mother of his children he will not automatically become their guardian on the death of their mother. Please indicate if you require further advice. ☐

We will provide in your will for your Trustees to have power to make payments to the guardians for the maintenance, education and general benefit of your children.

- 22.** If you wish to make a guardianship appointment, please give full details 1st or sole Guardian. Please give the full name(s) address(es) and relationships to you of the Guardians.

Name	
Address	
Relationship to you	
2nd joint Guardian (if appropriate)	
Name	
Address	
Relationship to you	

- 23.** If the person(s) named above are unable or unwilling to act, do you wish to make a substitute appointment? If so, please give full details
1st or sole substitute Guardian

Name	
Address	

Relationship to you	
2nd substitute joint Guardian (if appropriate)	
Name	
Address	
Relationship to you	

24. YOUR BEQUESTS

Before dealing with the residue of your Estate are there any specific sums of money which you wish to leave to a particular person or charity?

If so please give the Amount(s) you wish to give and the full name(s) of the recipient(s) together with their address(es) and, if appropriate, relationship(s) to you.

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Additional information may be submitted on a supplementary sheet

25. In the event of the person(s) named above dying before you, do you wish the gift to pass to any child or children they may have?

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26. Before dealing with the residue of your Estate are there any specific items (for example, jewellery) which you wish to leave to a particular person?

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If so please give the descriptions of the item(s) and full name(s) of the recipient(s) together with their address(es) and, relationship(s) to you.

If you wish to leave a number of specific items, we suggest that you provide the full details in a separate list. In turn this list will be referred to in your Will. Should you wish to make any changes to the list in future, you will not have to change your Will.

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27. In the event of the person(s) named above dying before you, do you wish the gift to pass to any child or children they may have?

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YOUR RESIDUARY ESTATE

Where you are married, or living with a partner, it is usual for your Wills to be “mirror images” when dealing with the Residue to ensure that all beneficiaries inherit, particularly if you were to die together. It is common for an Estate to be left to a surviving spouse or partner and on the second death to any surviving children. You may also consider making a third level of bequests (e.g to parents, brothers, sisters etc.) in the event of you all dying.

28. Please tick the appropriate box from the statements made below:

A. On the first death we wish the Estate to pass to the survivor of us. If he or she does not survive then we wish the Estate to pass to our child or children named below. ☐

NOTE: It is possible that your family may increase, we would advise that your Will should refer to “my child or children” which will avoid you having to make a new Will in these circumstances. If this is appropriate to you please tick here

Alternatively, you should give full names of your child or children below

<p>If you do not wish your Estate to be shared equally among those named please indicate beside each name the percentage share of your Estate which they should receive.</p>
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OR

B. On the first death, we wish the Estate to pass to the survivor of us. If he or she does not survive then we wish the estate to pass to the beneficiary(ies) named below. ☐

If you do not wish your Estate to be shared equally among those named please indicate beside each name the percentage share of your Estate which they should receive.

OR

C. On the first death, we do not wish the Estate to pass to the survivor of us but instead to pass to the beneficiary(ies) named below. ☐

If you do not wish your Estate to be shared equally among those named please indicate beside each name the percentage share of your Estate which they should receive.

29. If all of the above-named beneficiaries die before the survivor of us, we wish the Estate to pass to the beneficiary(ies) named below.

If you do not wish your Estate to be shared equally among those named please indicate beside each name the percentage share of your Estate which they should receive.

30. Please state at what age you would wish any minor beneficiary to inherit if other than 18, (eg 21, 25 etc).

- 31.** Are any of your beneficiaries or potential beneficiaries mentally or physically handicapped? If so give details.

- 32.** Is there anything else you wish to make us aware of?

Thank you for completing our Will questionnaire. Please email this form back to your advisor at your earliest opportunity in order for us to move forward.