

## WILL QUESTIONNAIRE

All information will be treated in the strictest confidence

### 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  
*Please tick appropriate box(es)*

Single

Married

Separated

Divorce

Widowed

Partner/common law spouse

6. 

If married, date of marriage	
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**NOTE - If you are married and living with your spouse or living with a partner he/she is strongly advised to make a will. If they wish to do so please contact us and we shall forward the appropriate questionnaire for completion.**

#### **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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10. 

Is your permanent home in England or wales?	
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11. 

If not, please state which country	
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12. 

Is your ability to read and sign your Will affected by any condition? If yes please supply details.	
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## INFORMATION ABOUT YOUR CHILDREN

### 13. Details Required

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

Please indicate if they are male or female.

<b>Child 1</b>		<b>Child 2</b>	
Gender		Gender	
DOB		DOB	
<b>Child 3</b>		<b>Child 4</b>	
Gender		Gender	
DOB		DOB	

Please add more if required.


## 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) name to the right to act as my Executor(s)	
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I wish to appoint the person(s) name to the right with THOMAS FLAVELL & SONS	
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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. *Please submit on a supplementary sheet*

16.	UK ASSETS	Details	Your 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		£
	<b>TOTAL</b>		£
		<b>LIABILITIES</b>	<b>YOUR DETAILS</b>
	Mortgage outstanding		£
	Credit cards		£
	Other		£
			£
	<b>TOTAL</b>		£
	<b>NET ASSETS / LIABILITIES (Assets less liabilities)</b>		£

**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)**

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?	
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 1<sup>st</sup> or sole Guardian. Please give the full name(s) address(es) and relationships to you of the Guardians.

<b>Name</b>	
<b>Address</b>	
<b>Relationship to you</b>	
<b>2<sup>nd</sup> joint Guardian (if appropriate)</b>	
<b>Name</b>	
<b>Address</b>	
<b>Relationship to you</b>	

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 of 1<sup>st</sup> or sole substitute Guardian



<b>Name</b>	
<b>Address</b>	
<b>Relationship to you</b>	
<b>2<sup>nd</sup> substitute joint Guardian (if appropriate)</b>	
<b>Name</b>	
<b>Address</b>	
<b>Relationship to you</b>	

**YOUR BEQUESTS**

24.	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?	
25.	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.	
26.	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?	
27.	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?  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.*

28. 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?

## **YOUR RESIDUARY ESTATE**

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

A. I wish my Estate to pass to the person or charity named below.

In the event of the person named above dying, do you wish the gift to pass to any children they may have?

**OR**

B. I wish my Estate to be shared between the persons and I or charity(ies) names 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.*

In the event of the person named above dying, do you wish the gift to pass to any children they may have?

If the above beneficiary(ies) named in A or B above die before me, I wish the Estate to pass to the person(s) and / or charity(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.	In the event of the person named above dying, do you wish the gift to pass to any children they may have?	
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31.	Please state at what age you would wish any minor beneficiary to inherit if other than 18, (eg 21, 25 etc).	
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32.	Are any of your beneficiaries or potential beneficiaries mentally or physically handicapped? If so give details.

33.	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.