

CONFIDENTIAL QUESTIONNAIRE FOR WILLS

CLIENT'S NAME:

This questionnaire is designed to save our client's and our own time. Please use it to consider and note down your thoughts and queries. Do not worry if you cannot answer all the questions. If in doubt please put "Discuss" in the space provided. Where a name is asked for please give the full forename(s) and surname. If there is not enough room please use a separate sheet.

LEGACIES:

A gift of either a fixed cash sum or a specific item (eg jewellery).

EXECUTORS:

The person or persons you nominate to carry out your instructions after your death. If a minor (under 18) is or could be a beneficiary then you must have **TWO EXECUTORS**. You can nominate your husband, wife, members of your family or independent Executors or a firm of solicitors, accountants or a bank. Married couples often appoint each other as their Executor and also take the recommended precaution of nominating an alternative Executor.

An adult beneficiary can also be an Executor.

LIFE INTEREST:

If this option is chosen then all or part of your estate (according to your instructions) will be held by your Executors (acting Trustees) and is generally known as the Trust Fund. Your Executors will invest the Trust Fund and the beneficiary will be entitled only to the interest produced by the investments. When the beneficiary dies the investments are paid in accordance with **YOUR** Will rather than that of the beneficiary. Often such an arrangement will be made to provide the use of a home. This option can be chosen by spouses who wish to protect at least part of their estate in the event that a surviving spouse should remarry and by those who have been married before wish to see their assets pass to their own family eventually.

WHERE DID YOU HEAR ABOUT NEVES?.....

ABOUT YOU

1	<p>Your full name(s) (Please underline your surname)</p> <p>Are you known by any other name?</p>	
2	Your full address (including post-code)	
3	<p>Your telephone number (daytime)</p> <p>Your telephone number (evening)</p> <p>Your email address/website</p>	
4	Your date of birth	
5	Your occupation	
6	Your employer	
7	<p>Have you made a Will before?</p> <p>If so where is the original?</p>	Yes/No
8	<p>Are you single, married, cohabiting, widowed, divorced, separated? Please state which descriptions apply particularly if more than one.</p> <p>If you are cohabiting would you like to discuss a cohabitation agreement?</p> <p>If you are marrying would you like to discuss a prenuptial agreement?</p> <p>If you are divorcing or separated would you like to discuss this with our family department?</p> <p>Please give present husband's/wife's/ full name and details of any court orders including dates</p>	
9	If you have any children please note their full	

	names and dates of birth, (and if they do not live with you, their addresses)	
10	<p>Apart from anyone already named on this form are there any others dependent on you?</p> <p>If so please identify them and their dependency.</p>	Yes/No
11	<p>If you have any children under 18 years, do you wish to appoint guardians?</p> <p>If yes please give full names and addresses and you relationship to that person/s.</p>	Yes/No
12	<p>If you own land or a house/flat/bungalow please state the address and the approximate value of the property.</p> <p>If you are a joint owner who is/are the other owner/s?</p> <p>What percentage do you own?</p> <p>Do you recall if you own the property as joint tenants or tenants in common?</p> <p>Where are the Title Deeds?</p> <p>Do you have a mortgage?</p> <p>Is it covered by a life policy?</p> <p>If you share the property with someone not mentioned on the deeds or in unequal shares do you have a declaration of trust? If not would you like one?</p>	
13	Do you own any property or hold any money	

	outside the UK? (Please give details)	
14	<p>Approximate total value of solely owned assets.</p> <p>Bank accounts Building Society accounts PEPs/Unit Trusts/Shares Life Policies National Savings Pension lump sum payments Other</p> <p>Have you nominated the benefits of Life Insurance and Pension Policies?</p> <p>Approximate total value of jointly owned assets (please state who is the other joint owner).</p> <p>Bank accounts Building Society accounts PEPs/Unit Trusts/Shares Life Policies National Savings Pension lump sum payments Other</p>	
15	Do you now, or might you, benefit under any Trust or settlement or Will? (Please give details).	
16	Have you made any gift (other than to your spouse or to a charity) in the last 7 years, or do you intend to in the near future? (Please give details and ignore gifts up to £3,000 in any one tax year)	

ABOUT THE GIFTS IN YOUR WILL

Please put “not applicable” in any section which does not apply to you.

17	<p>Please detail any cash legacies you wish to be paid out even if your husband/wife or other main beneficiary survives you and inherits the residue of your Estate. (Include the amount of money and the full name and address of each beneficiary).</p> <p>Please detail any non cash gifts you wish to be paid out even if your husband/wife or other main beneficiary survives you and inherits the residue of your Estate. (Include full description and the full name and address of each beneficiary).</p>	
18	<p>On your death do you wish to leave all your Estate unconditionally to your husband/wife/partner if you die before him/her? (Married couples usually answer yes here)</p>	Yes/No
19	<p>Do you want your Will to contain a life interest? See notes on page 1. (Please give details and say why you think a life interest is appropriate to you).</p>	
20	<p>If your husband/wife/partner dies before you, do you wish to leave all your Estate equally between your children?</p>	
21	<p>If any of your children die before you, do you wish their share to go to:-</p> <ul style="list-style-type: none"> a) Their children? b) Their spouse? c) Your surviving children? 	<ul style="list-style-type: none"> a) Yes/No b) Yes/No c) Yes/No
22	<p>To whom do you wish to leave your Estate if the above does not apply? (Please give full names and addresses).</p> <p>If more than one person please indicate how it is to be divided, are they to have equal or unequal shares?</p>	

23	<p>Please detail any cash legacies you wish to be paid out if your husband/wife or other main beneficiary does not survive you. (Include the amount of money and the full name and address of each beneficiary).</p> <p>Please detail any non cash gifts you wish to be paid out if your husband/wife or main beneficiary does not survive you. (Include a full description and the full name and address of each beneficiary).</p>	
24	<p>If any beneficiary named in your Will is under the age of 18 years, do you intend that they inherit at 18/21/25 years or when?</p>	
25	<p>Is there anything you wish to say about how your Estate is to be dealt with or divided that has not been covered so far?</p>	

ABOUT EXECUTORS AND GENERALLY

26	<p>Who do you wish to be your Executor/s? (Please read the notes on this)</p> <p>Please give full names and addresses.</p>	
27	<p>Your Will can contain your wishes regarding cremation or burial. If you wish it to do so please note them here.</p>	

IF YOU WISH TO DISCUSS ANY OF THE QUESTIONS OR THE ANSWERS IN MORE DETAIL PLEASE WRITE “DISCUSS” IN THE APPROPRIATE ANSWER BOX.

**DO YOU WISH TO DISCUSS MAKING A LASTING
POWER OF ATTORNEY?**

**DO YOU KNOW ANYONE ELSE WHO MIGHT WANT
INFORMATION REGARDING MAKING A WILL? We can
let you have a pack to pass to them with information on
our services.**