

Burch Phillips & Co. - Solicitors

Preparing Your Will

A Questionnaire

This questionnaire raises questions relating to your personal and financial affairs which need to be considered when preparing your Will. You may not be able to answer all the questions and we do not expect you to do so. It would be helpful if you could complete the first part of the questionnaire, providing us with information about you and your family. You need not complete the latter parts of the questionnaire if you do not wish to do so but you may find it helpful to read it through as these questions are ones that you should be thinking about when you prepare your Will. If you can provide an estimate of the assets in your estate this would be very helpful and would provide a useful summary for the future.

PART 1 — YOUR DETAILS

1. Name

Forenames

Surname

Have you been known by any other name and do you own assets in another name? If so, please provide details.

2. Address

Address

Telephone number (work) (home)

Fax number (work) (home)

E-mail

3. Other details

Date of birth

Nationality

Domicile

Country of residence for tax purposes

Occupation

PART 2 — YOUR SPOUSE OR PARTNER

1. Name

Forenames

Surname

Has your spouse/partner been known by any other name? If so, please give details

2. Other details

Date of birth

Nationality

Domicile

Country of residence for tax purposes

Occupation

**3. Marriage/
partnership details**

If you are married —

Year of marriage

Did you sign a pre-nuptial contract or other similar agreement? Yes No

If you are not married—

Do you intend to get married in the near future? Yes No

Did you sign a cohabitation or other similar agreement? Yes No

Previous marriages—

Have you been married before? Yes No

PART 3 — CHILDREN

1. Your children

(1) Name

Date of birth

Address

(2) Name

Date of birth

Address

2. Grandchildren

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	

3. Your spouse's or partner's children

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	

PART 4 — PROPERTY

1. House occupied as your main home

Address

(1) Is the property owned in your sole name or jointly?

sole name joint names

Name of joint owner

Joint tenants Tenants in common

In what shares is the property held?

Freehold Leasehold

Value

Details of mortgage

(2) Is the property rented?

Yes No

(3) If neither of the above, who owns the property?

(4) Where are the deeds to the property located?

2. Other houses

Address
Is the property owned in your sole name or jointly?
<input type="checkbox"/> sole name <input type="checkbox"/> joint names
Name of joint owner
<input type="checkbox"/> Joint tenants <input type="checkbox"/> Tenants in common
In what shares is the property held?
<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Value
Details of mortgage

3. Business

Name of business
Address
Nature of business
<input type="checkbox"/> Company Number of shares % of shares
<input type="checkbox"/> Partnership Partnership share
<input type="checkbox"/> In sole control

4. Bank, Building Society etc accounts

Name of Bank/Building Society		
Branch		
Account number		
Estimated value		
Is the account held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If the account is held jointly—</i>		
Who provided the funds, and in what shares?		

5. Chattels of significant value

Description	
Value	
Are the chattels held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Heritage exemption?	<input type="checkbox"/> Yes (CTO reference) <input type="checkbox"/> No

6. Life assurance and pension policies

	Life assurance policies	Pension policies
Details of policy		
Life assured		
Value		
Written in trust	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

7. Stocks and shares

	In sole name	In joint names
Value of investment portfolio		
Investment manager		
If the fund is held jointly is it held as joint tenants or tenants-in-common		<input type="checkbox"/> Joint tenants <input type="checkbox"/> Tenants-in-common <input type="checkbox"/> Not known

8. Property situated outside the UK

Type of property	Whereabouts	Value
Type of property	Whereabouts	Value

9. Settlement interests

Do you have any interest under a settlement created by you or any other person , if so please provide details

Type of Settlement: Interest in Possession Discretionary Accumulation and maintenance

Your Interest: Interest in Possession Discretionary Beneficiary Default Beneficiary

Do you have a power of appointment over the Trust Fund? Yes No

Are the trustees resident in the UK? Yes No Have they ever been resident outside the UK? Yes No

10. Other assets

Please provide details

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Have you made any gifts within the last seven years? If so, please provide details.

<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>

Do you expect to receive any property of substantial value in the near future, for example as an inheritance? If so, please provide details

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Summary of property	Value of property	
	In sole name	In joint names
House (occupied as main home)		
Business		
Bank, Building Society accounts		
Chattels		
Insurance policies		
Pension policies		
Stocks and shares		
Property situated outside UK		
Other assets		
Total		

PART 5 — OTHER WILLS

Please provide details of any existing Wills (and a copy)

Where is the original located?

PART 6 — FUNERAL WISHES AND APPOINTMENT OF EXECUTORS AND GUARDIANS

Funeral wishes

A testator may include funeral directions in his Will but these will not be legally binding on his executors

buried cremated no preference body used for medical research

Executors

A testator should choose who should be his executors and appoint them in his Will. In general terms the duties of the executors are to collect in the estate of the deceased, to pay the deceased's debts and to distribute to the persons properly entitled in the Will. You should appoint at least two executors to guard against an executor's prior decease. You can appoint substitute executors who will act if, for any reason, an executor is unable or unwilling to act as executor. You may appoint your spouse or partner as executor, and also any beneficiary.

Executors	(1) Name
	Address
	(2) Name
	Address
	(3) Name
	Address
	(4) Name
	Address

Substitute executors	(1) Name
	Address
	(2) Name
	Address

Cash gifts (continued)	Address
	Name
	Address

Residue

Your residuary estate is what is left after your executors have paid all debts, expenses, administration costs and legacies. You may consider the following:

- (1) Gifts to spouse/partner may be made outright or on continuing trusts. There may be advantages in using a continuing trust.
- (2) Gifts to children or grandchildren. These can be made outright or on continuing trusts. If the children or grandchildren are young, you may wish to delay distribution of capital until they are older.
- (3) Default gifts. You should decide whom you would wish to benefit if your spouse/partner and children die without issue. You may wish to benefit charities.

(1) Name Share of residue

Address

(2) Name Share of residue

Address

PART 8 — ENDURING POWERS OF ATTORNEY AND LIVING WILLS

Enduring power of Attorney

Have you appointed someone to act as your attorney under an Enduring Power of Attorney? If so, please provide details (and a copy) of the Enduring Power of Attorney.

Name and address of attorney(s) and his (their) relationship to you

Where is the original Enduring Power of Attorney located?

Where two or more attorneys are appointed do they act Jointly and severally Jointly

Has the Enduring Power of Attorney been registered with the Court of Protection?
 Yes No

Living Will

A living will (also called an advance directive) is a document in which a person (whilst competent) gives directions as to what should happen as and when he becomes incapable of taking responsibility for his own health care. It is usually made with the object that, should a patient find himself in a state of terminal illness and incapacity, no procedures designed to sustain or prolong life will be used on him and those already in place will be withdrawn. The use of a living will has not so far been tested in the English courts. Please provide a copy of the Living Will

Do you have a living will? yes no Where is the original Living Will located?