

**WILL QUESTIONNAIRE**

## WILL QUESTIONNAIRE

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**(A) DETAILS FOR YOU AND YOUR PARTNER**

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1. **FULL NAMES** (include any aliases):-

**ADDRESS:**

(a)

(b)

**HOME TEL NO:**

**EMAIL ADDRESS:**

**D.O.B:**

(a)

(b)

**OCCUPATIONS:**

**ARE YOU MARRIED OR DO YOU HAVE A CIVIL PARTNERSHIP**

**YES**

**NO**

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3. **HAVE YOU EVER BEEN ...**

**YES**

**NO**

**DIVORCED?**

**A WIDOW(ER)?**

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4. **IF THERE IS AN EXISTING WILL FOR YOU PLEASE STATE ITS DATE AND WHERE IT IS KEPT**

**(B) DO YOU HAVE CHILDREN?**

**YES**

**NO**

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Please provide their full names, addresses  
and dates of birth

**If you have children from a previous relationship  
are you worried about their interests?**

**YES**

**NO**

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**(B) YOUR EXECUTORS**

Your Executors are responsible for collecting assets and distributing your estate in accordance with your Will. We advise you should have more than one Executor if possible. The maximum you can have is four. You can appoint your solicitor if you wish.

**Who would you like to appoint? .**

**(a) Name:**

**(b) Name:**

**Address:**

**Address:**

**Occupation:**

**Occupation:**

**Relationship:**

**Relationship:**

(C) YOUR DOMICILE/RESIDENCE

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(a) WHERE ARE YOU RESIDENT FOR INCOME TAX PURPOSES?

(b) WHERE IS YOUR COUNTRY OF DOMICILE?

(c) IS THE PROPERTY TO BE COVERED BY THIS WILL?

(i) WORLDWIDE

(ii) UK ONLY

(iii) OTHER SPECIFICALLY

**NOTE** – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets that you own as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we may be able to arrange alternative specialist advice for you, for which there will be an additional fee.

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(D) INHERITANCE TAX

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**Do your sole/joint estates exceed £ 325,000?**

**If so, do you want Inheritance Tax Advice when making your Will? We will provide such advice for an additional fee. Please read the note below.**

**YES**

**NO**

**NOTE** – If you do not want Inheritance Tax advice we will only advise of the likely Inheritance Tax consequences of the provisions you have asked us to include in your standard Will on the basis of the information you have given to us, and on the basis of the tax laws as they presently operate. We will not advise you on the most tax efficient method of drafting your standard Will nor give advice on lifetime tax planning as part of our standard Will drafting service, but if you ask us to we will provide such advice for an additional fee.

**\*\*IF INHERITANCE TAX ADVICE IS REQUIRED PLEASE PROVIDE DETAILS OF YOUR SOLE AND JOINT ASSETS SEPARATELY\*\***

(E) OTHER

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1. (a) Are any of your beneficiaries mentally impaired? YES NO

If yes, please state their name(s) and age(s)

- (b) Do you require legal advice in relation to the best way to provide for a beneficiary who is mentally impaired? (Please read the note below)
- YES NO

**NOTE** – If you do not want advice on providing for mentally impaired beneficiaries in your Will we will only advise of the likely consequences regarding such beneficiaries welfare benefits for the provisions you have asked us to include in your standard Will, on the basis of the information you have given to us, and on the basis of the welfare benefits regime as it presently operates. We will not advise you on the most efficient method of drafting your standard Will to take account of the benefits regime as part of our standard Will drafting service, but if you ask us to we will provide such advice for an additional fee.

2. If you are divorced/separated, have your financial affairs been sorted out? YES NO
3. Do you have any dependants other than children? (see note below) YES NO
4. Are there any dependants you are not providing for in this Will? YES NO

**NOTE** A dependent is ordinarily someone who relies on you financially or someone who lives with you, although other classes of persons may fall under the dependent category. If you are unsure whether someone constitutes a dependent then please ask your legal advisor. If you do not provide for a dependent in your Will, this may have a consequence after your death. We will only advise of you of the likely consequences regarding dependents, on the basis of the information you have given to us, and on the basis of the law as it presently operates.

(F) **DISTRIBUTION OF YOUR ESTATE**

(i) **GIFTS**

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1. **SPECIFIC GIFTS** e.g. jewellery, property, shares

To whom?

Is the legacy to be  
free of Inheritance Tax?

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2. **LEGACIES** i.e. a sum of money

Amount

To Whom

Is the legacy to be  
free of Inheritance Tax

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(ii) **REMAINDER OF YOUR ESTATE**

This is everything that is left after payment of your debts etc. and the specific gifts and legacies given

Do you want the remainder of your estate to go to  
your Spouse/Partner?

**YES**

**NO**

If not, where do you want it to go and in what proportions?

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If those named above die before you, where do you then want it to go, i.e your grandchildren, other relatives etc....

**SUMMARY**

PLEASE SIGN BELOW TO INDICATE WE MAY COMMENCE DRAFTING YOUR WILL/s BASED ON THE INSTRUCTIONS CONTAINED HEREIN. IF JOINT INSTRUCTIONS ARE TO BE GIVEN, PLEASE BOTH SIGN.

**PLEASE ALSO SIGN TO INDICATE YOU HAVE READ THE NOTES CONTAINED IN SOME PARTS OF THIS QUESTIONNAIRE (shown in *italics*) WHICH CONSTITUTE DISCLAIMERS AS TO THE EXTENT OF THIS FIRMS RETAINER IN RELATION TO YOUR WILL/s**

If you have any questions not covered by this form please make a note below and speak to your legal advisor about them at your appointment

**I/We confirm my/our instructions contained in this questionnaire and that I/we have read the notes which constitute the disclaimers and understand their meaning.**

Signed.....

Signed.....

**RETURN TO: Private Client Department**

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[www.ridleyandhall.co.uk](http://www.ridleyandhall.co.uk)

**QUESTIONS:-**