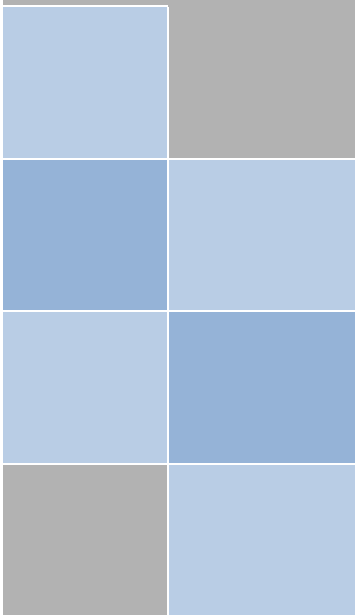


WILL QUESTIONNAIRE

Please print and fill in this document with the relevant information and bring it with you to your next appointment.



DEREK SMITH & CO
a new service for an old practice

PART A

GENERAL NOTES

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
2. On divorce, gifts to your Husband / Wife are cancelled as is his/her appointment as an Executor but the rest of the Will stands. This can create problems and it is better to make a new will.
3. If you are not making any provisions for a Husband / Wife / Partner, or a former Husband / Wife / Partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
4. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

YOU AND YOUR FAMILY

1. YOUR DETAILS

forename <input type="text"/>	surname <input type="text"/>	address <input type="text"/>
post code <input type="text"/>	contact number <input type="text"/>	occupation <input type="text"/>
date of birth <input type="text"/>		

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, Please enter the details below.

2. YOUR HUSBAND | WIFE | PARTNER

forename	surname
<input type="text"/>	<input type="text"/>
occupation	date of birth
<input type="text"/>	<input type="text"/>
year of marriage	
<input type="text"/>	

3. MARRIAGE \ PARTNERSHIP DETAILS

a) Year of marriage	b) Are you married to your partner?
<input type="text"/>	<input type="radio"/> NO
	<input type="radio"/> YES
c) do you intend to marry / re-marry in the near future ?	d) has either of you been married before ?
<input type="radio"/> NO	<input type="radio"/> NO
<input type="radio"/> YES	<input type="radio"/> YES

4. YOUR CHILDREN

Please include ALL children from any previous marriages or relationships.

forename	surname	date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>
address, if different from yours	is this child from your current marriage ? *	
<input type="text"/>	<input type="radio"/> NO	
	<input type="radio"/> YES	

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

5. YOUR HUSBAND / WIFE / PARTNER'S CHILDREN

Please include ALL children from previous marriages or relationships.

forename <input type="text"/>	surname <input type="text"/>	date of birth <input type="text"/>
address, if different from yours <input type="text"/>		

Please note:

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances.

PART B

YOUR HOME AND OTHER ASSETS

6. YOUR HOME

OWNED ?

Is it owned in your name
alone ?

YES

Is it owned in joint names with your
husband / wife / partner ?

YES

Is it owned in the name of your
husband / wife / partner ?

YES

RENTED ?

is your home rented ?

YES

OTHER (e.g. provided by a relative)?

Is your home neither owned or rented?

YES

If so, please give details.

OTHER (e.g. provided by a relative)?

is your home neither owned or rented?

YES

If so, please give details.

7. BUSINESSES

Do you have a business ?

YES

NO

If yes, please state type of business.

Is the business a

Limited Company ?

Partnership ?

In your sole name ?

8. YOUR MAIN ASSETS

Do you own any assets, in your own name ?

YES

NO

ASSETS DETAILS

Description

Value

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

9. JOINT ASSETS

Please note that jointly owned assets generally pass to the joint owner automatically and cannot be given away by will.

Do you have any jointly owned assets ?

YES

NO

ASSETS DETAILS

Description

Value

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

10. INTERNATIONAL ASSETS

Do you own any assets abroad ?

YES

NO

ASSETS DETAILS

Description

Value

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

PART C

FUNERAL, EXECUTORS, GUARDIANS

11. FUNERAL

FUNERAL PREFERENCES

Do you wish to specify in your will to be :- ?

- Buried ?
- Cremated ?
- No Preference ?

Please Note:

- You should make these wishes known to your immediate family as well and rely on what is in your Will.
- If you wish to leave any part of your body for medical purposes tell your family and your Doctor and carry a Donor Card.

12. EXECUTORS

You must appoint Executors to carry out the instruction in your will. It is wise to have at least two and you may appoint your Husband / Wife / Partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

Would you like Partners from our firm to act as your Executors ?

YES

NO

Please enter at least FOUR executors, in no particular order.

Name

Address

Name

Address

Name

Address

Name

Address

13. GUARDIANS

GUARDIAN PREFERENCES

You may want to appoint one or two people to act as Guardian(s) for children under 18 years. The appointment will usually only apply if you and the child's other parents are both dead. The position may be different if you are a single parent. This issue can be discussed further with the Solicitor at your appointment.

Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

Would you like to appoint Guardians for your children ?

YES

NO

PART D

BENEFICIARIES

The main part of your estate is called "the residue". Before giving away the residue you may wish to make certain gifts of cash or belongings to individual children, grandchildren, friends or charities. These are known as "beneficiaries".

14. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18 years.

Name	Address
<input type="text"/>	<input type="text"/>

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

15. GIFTS OR ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified.

Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or the cash equivalent.

Name	Address	Article description
<input type="text"/>	<input type="text"/>	<input type="text"/>

PLEASE ADD MORE ON A SEPARATE SHEET
PLEASE REFERENCE WITH QUESTION NUMBER

16. RESIDUE

This is all that you own except jointly owned property and the gifts made in Question 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you.

If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parents share.

The following are the more common provisions made. If you wish to use one of these, tick the appropriate box, if not please go to Question 18.

QUESTION A

Everything to my Husband / Wife / Partner named at Question 2, outright, but if he/she has died then to my children named at Question 4, equally :

YES

QUESTION B

Everything to my children, named at Question 4, equally and any other children of mine:

YES

You may choose the age at which your children will receive their entitlement.

Insert either 18, 21 or 25.

QUESTION C

To my Husband / Wife / Partner named in Question 2, but if he/she has died before me, to the person(s) or organisation(s) named in the box below. If not in equal shares, then show the share each is to take.

YES

QUESTION D, PART 1

Other. If none of A, B or C are appropriate, please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares ?

YES