

Your Will Client Questionnaire

Your Will

Fatons



Please complete this confidential Questionnaire (deleting where necessary) and return it to us so that we can “tailor make” a Will to suit your circumstances and your wishes.

If you need more room please attach a separate note. If you would like advice in completing the questionnaire, or you would prefer to discuss your requirements, please telephone one of our specialists who will be delighted to assist you.

Please contact us if, instead of completing the questionnaire, you would prefer to give us your instructions by telephone or in a meeting. **There is no extra cost involved.**

Personal details

First Names:

Surname:

Address:

Postcode:

Daytime Telephone:

Mobile:

Email:

Date of Birth:

Name of Spouse, Partner or Civil Partner (Please specify):

Please give their address if different:

Address:

Executors

1. Who do you want as your executor, to handle your estate after your death? Although you can have only one executor we usually recommend at least two in case one of them dies before you. They should be responsible individuals willing to look after and deal with your estate. Please remember to ask them first, because it is quite a responsibility. Often clients prefer to appoint us as their solicitors for this purpose (there is no additional charge made for us being appointed or acting as your executors).

(i) Spouse/Partner **and/or**

(ii) Eatons **and/or**

(iii) Someone else (please give their names):

Name:

Name:

Address:

Address:

Beneficiaries

These are the people you care about and to whom you want to leave your estate. Please note there is no limit to the number of gifts that you can leave and that you can leave people three different types of gift: (i) A fixed sum of money (ii) A specific item of value (e.g. a piece of jewellery) or (iii) your whole estate or a certain percentage of it.

2. Do you wish to leave everything to your spouse/partner/civil partner?

Yes *Go to Question 3*

No *Go to Question 4*

3. If you answered **Yes** to Question 2, but your spouse/civil partner dies before you, who do you instead wish to benefit from your estate? Please give details of their name(s), address(es), relationship to you (e.g. son/daughter), age and what share or amount they are to have?

4. If you answered **No** to Question 2, please give details of whom you wish to benefit, including their name(s), address(es), relationship to you (e.g. son/daughter), age and what share or amount they are to have?

5. Please provide the name(s) and address(es) of those whom you wish to benefit from your estate in the event of your principal beneficiary(ies) (as listed above) dying before you. Include their relationship to you (e.g. son/daughter), age and what share or amount they are to have?

6. At what age do you want your children or any other minor child to receive their entitlement?

18 21 25 Other *(Please tick)*

Guardians for Infant Children

7. Do you wish to appoint guardians of any infant children? *(Please circle)* **Yes/No.**

If **Yes**, give the full names and addresses of the guardians and the children. It is usual for any such guardianship to only take place in the event of the natural parent(s) dying first.

Name:

Name:

Address:

Dependants

8. Do you have any other dependants or anyone for whom you pay maintenance who have not been listed above? **Yes/No** If **Yes** please give details.

9. Do you have any specific funeral wishes (e.g. cremation or burial)?
Yes/No If **Yes** please give details.

10. Is there anything else that you would like to include? (e.g. you might wish to give a gift of a sum of money; give a specific personal possession; or make a charitable donation).
Yes/No If **Yes** please give details.

General notes

Please let us know if the following are relevant or to ask for advice:

1. If your total assets (including your house and Life Insurance Policies) are worth more than the current Inheritance Tax limit you will need advice on minimising or avoiding Inheritance Tax.
Yes/No
2. A Will is usually completely cancelled if you marry. If you are divorced after making it you will need advice on the implications. If you are to marry, a Will could be made in contemplation, which would not be revoked by that marriage. **Yes/No**
3. If you are not leaving anything to your spouse/partner/dependants/children (including illegitimate and adopted children or former dependants) it is possible for them to make a claim against your estate under the Inheritance (Provision for Family & Dependants) Act. **Yes/No**
4. If you have a business or assets which are abroad or are jointly owned. **Yes/No**

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