



CONFIDENTIAL WILL QUESTIONNAIRE

Before you make a Will, it would be helpful to have some background information about you. This will enable us to advise you correctly. You can help us by reading and completing this Questionnaire and returning the document to us. The information given will of course be treated in the strictest confidence.

YOUR DETAILS

FULL NAME (INCLUDING TITLE)

FULL ADDRESS
(INCLUDING POSTCODE)

OCCUPATION

NATIONAL INSURANCE NUMBER

DAYTIME TELEPHONE NUMBER

EMAIL ADDRESS

DATE AND PLACE OF BIRTH

STATUS (MARRIED/SINGLE/ETC)

GENERAL INFORMATION

The following page requests general information concerning your personal circumstances. Please give full details where necessary.

QUESTION	YES/NO	DETAILS
1. Is this your first English Will?	<input type="checkbox"/>	<input type="text"/>
2. Are you known by any other name?	<input type="checkbox"/>	<input type="text"/>
3. Are you married or in a Civil Partnership? If so to/with whom?	<input type="checkbox"/>	<input type="text"/>

QUESTION	YES/NO	DETAILS
4. Have you been married or in a Civil Partnership before? If so to/with whom? Are they still alive ?	<input type="checkbox"/>	
5. If divorced or your Civil Partnership has been dissolved or divorce or dissolution proceedings are pending, state briefly the current position.		
6. Is there anybody you wish to exclude from any benefit under your Will who may be able to make a claim against your estate after your death e.g. Spouse/Civil Partner, former spouse/Civil Partner, child or other dependant?	<input type="checkbox"/>	
7. If you or your Spouse/Civil Partner were born outside England and Wales or have ever lived or worked outside these areas, please state your Country of domicile and residence for taxation purposes.		
8. Do you or your Spouse/Civil Partner own any assets outside England and Wales?	<input type="checkbox"/>	
9. If you own property outside England and Wales, have you made a foreign Will dealing with it?	<input type="checkbox"/>	
10. How is your house owned? Do you own it in your name alone, is it in joint names, or in the name of someone else or is it rented? Is there a Mortgage? If so is it covered by life assurance?		
11. Have you given any verbal or written promise to anyone concerning your Will?	<input type="checkbox"/>	
12. Does the value of your assets (including endowment policies, pensions etc) exceed £325,000.00?	<input type="checkbox"/>	
13. Are you or your Spouse/Civil Partner involved in any other trust or settlement?	<input type="checkbox"/>	
14. Have you or your Spouse/Civil Partner made gifts totalling more than £3,000.00 in any one out of the last seven tax years?	<input type="checkbox"/>	

15. Are you a beneficiary under any insurance policy on someone else's life?		
16. Are any of your beneficiaries in receipt of benefits?		
17. Do you have a financial adviser or accountant?		

SPECIFIC INFORMATION - PLEASE PROVIDE FULL NAMES AND FULL ADDRESSES:

QUESTION	ANSWER
<p>1. (a) Whom do you wish to appoint as Executors and Trustees of your Will? Please provide full names and addresses. (See general notes below)</p> <p>(b) Please give details of any substitute Executors in the event of those named above predeceasing you.</p>	
<p>2. Do you have any children? If so, please state their full names, dates of birth and whether they are children of the marriage, adopted, step children or illegitimate children. Please also supply any other information you may feel is relevant.</p>	
<p>3. If you have children under 18, please give full names and addresses of any Guardians you wish to appoint to look after them if your spouse does not survive you.</p>	
<p>4. Do you wish to make specific gifts to any named individuals, e.g. sums of cash, jewellery, personal chattels? If so, please specify the gift, the recipient, his/her name, age and address and relationship to you. (If insufficient space, please list on a separate sheet of paper)</p>	
<p>5. If any of your estate is left to children currently under the age of 18, please state at what age they should receive their inheritance.</p>	

QUESTION**ANSWER**

6. (a) Please give details of the person or persons to whom you wish to leave the remainder of your estate. Please provide full names, ages and addresses and their relationship to you.
- (b) Please give details of any substitute beneficiaries in the event of those named above predeceasing you.

7. Please state any particular funeral wishes (e.g. burial/cremation)?

8. We aim to prepare all Wills as quickly as possible, but please state if you have any medical condition, travel plans etc. which make the matter urgent.

Where would you like your appointment to take place ?

Norwich

Attleborough

GENERAL NOTES:

Your Executors and Trustees should be adult, trustworthy people as they will be responsible for administering your estate in accordance with your Will. Executors and Trustees can also be beneficiaries of your estate. You may appoint up to four Executors and these may include your spouse, professional advisers or relatives.

If you are not making provision for a Spouse/Civil Partner/Partner, or a former Spouse/Civil Partner/Partner, it is possible that he/she could make a claim against your estate. If this is likely, please ask for further advice from us.

Thank you for your co-operation in answering the above questions, which will help us to assess your requirements accurately.

Please feel free to ask for our help or advice or more information on any topic related to your Will.