

Fairbrother & Darlow

Solicitors

Will Questionnaire



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Anyone who owns property should consider the need to make a Will. There is no guarantee that property will pass to a loved one automatically when you die and this can cause real problems for those left behind.

In an age when many families have step-children, it is important to make sure that they are properly taken care of within a Will and not accidentally overlooked.

If you have young children, you can appoint Guardians to look after those children if you should die before they become 18.

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Will Questionnaire

You have made the sensible decision to make a Will. This questionnaire is designed to help you decide what needs to be put in your Will and it will help us to advise you on any other matters which might arise from the information provided.

We do prefer to meet with you to discuss your Will, but we realise that this can be difficult. If you would like us to prepare your Will without meeting with you, we can do this, but if possible, we would still like you to call at the office to sign it, so that we can make sure that you fully understand the Will and that it is properly signed and witnessed as required by law.

Once your Will has been signed, we will be happy to store it for you free of charge.

Qualified Solicitors prepare your Will. They will be pleased to answer any other questions you may have. Please call to discuss anything which you do not think is covered in this questionnaire.

General Information

Full Name:

Address:

Postcode:

Tel: (Home)

(Work)

(Mobile)

Date of Birth:

Email: (We can send a draft for approval)

1. Are you married, in a civil partnership or do you live with a partner?

Yes - Please give his/her full name. If a will is required for your partner, please ask for a separate questionnaire for him/her if not already supplied.

No

2. Do you have, or hope to have, Children?

No

Yes - Please give their full names and dates of birth and addresses

3. If you are able to, please give an indication of the value of your possessions, including house, contents, insurances and pension policies. (This information is not essential but will assist us in giving you any further advice about Inheritance Tax)

4. Do you own a house, either alone or jointly with someone else?

Please supply full details.

5. Are you helping anyone else with his or her living expenses at present?

This might be by paying maintenance to someone or by letting them live in your property.

No

Yes - please give full details

6. Are your personal circumstances likely to change in the foreseeable future? If so, it is important that you tell us. Sometimes a Will can be affected by other changes in your life, such as marriage or civil partnership. If we are not aware of these possible changes, we cannot make sure that your Will is unaffected by them. Please give us any further information which you think might be relevant.

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7. **Finally, there may be many questions you would like to ask before deciding on what to put in your Will. Please feel free to telephone us to discuss those questions.**

...and now to what you would like in your Will.

- A. **You need to appoint ‘EXECUTORS’.** These are the people you choose to make sure that your wishes will be carried out. If there is any possibility that infant children will receive some of your estate, you should have two executors - it is often better if these are not the people who will actually care for those children. You can appoint solicitors, banks, family or friends to be your executors. Please give **full names and addresses** of the people you would like to trust for this role.
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- B. **If you have children under the age of 18,** you can choose someone to look after those children if they are left without any parent. If you wish to nominate a ‘guardian’, please state his/her **full name and address** below.
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- C. **You may have special possessions** which you would like special people to receive. Please give a clear description of such items below, together with full details of the person(s) to whom they should go. Please state whether such gifts are to be made only if your spouse or partner has died before you.
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- D. **If you wish to give a sum of money** to anyone, apart from dividing your main estate, please give full details of the amount and the person below. Their full name and address should be stated. Please state whether such gifts are to be made only if your spouse or partner has died before you.
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E. Residue - After giving away any special gifts or sums of money, you are left with what is known as the 'residue' of your estate - everything else! This may include money in your bank, shares, houses and anything else at all. Who do you want to leave this to? If it is to pass to more than one person, please state in what shares.

F. If for any reason at all, the person or people you have mentioned so far cannot receive your 'residue', perhaps because they do not outlive you, who else would you want to give your estate to? If you have children or grandchildren, you can leave it to them without naming them to avoid missing out any future born children.

Children or grandchildren.

Others:
Please specify:

G. In the very unlikely event that no-one you have mentioned so far can inherit your estate, is there someone else you would like it to pass to? If you do not give details, there is the remote possibility that your estate will pass to someone in your family by default. To avoid this, please tell us *your* preferences and give full details of the person(s) or charity who should receive your estate.

H. To finish, it can often be important to loved ones to know that a person's final wishes have been complied with. If you have definite views on such things as burial or cremation, please state these below:

Thank you for completing this questionnaire. It does not replace the need for a meeting and, if you can, please bring this completed form to a meeting. Otherwise, we will prepare your Will from the information you have provided. You will receive a draft Will to approve. If you would like to change anything, simply let us know.