



## **JACKSON LONGE SOLICITORS**

### **WILL QUESTIONNAIRE**

We thank you for your instructions to prepare a Will for you.

Kindly complete this questionnaire and return it to us by email or by post our office address below.

The information on this form is confidential and shall not be divulged to anyone other than the partners and staff of Jackson Longe Solicitors for the purpose of preparing your Will.

We appreciate that the form is detailed but please note that this questionnaire is designed to help you consider some of the points you should think about in connection with your Will and shall ensure that we fully understand and comply with your wishes.

It will greatly assist us in preparing your Will if you answer all questions in full however if you are unable to answer any of the questions please do not worry, simply complete the form in as much detail as possible and a member of our Team will contact you.

Once you have completed the questionnaire, please sign and date where indicated on the last page and then return it to us so that we can begin preparing a draft Will for you to consider.

We strongly recommend that you keep your Will in a safe place. We shall be happy to keep your Will and other important documents in our deeds store on your behalf. We do not charge for this service.

If you would still rather speak with one of our lawyers rather than complete this form, please do not hesitate to telephone us on the number below for an appointment.

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## WILL QUESTIONNAIRE

This form is designed to give us some preliminary information about you and your family and your wishes for your Will. Please complete the form in readiness for our meeting or (if no meeting has been arranged) return the form to us. Some of the questions may not be relevant to you, but please complete those which are as fully as possible.

*Couples who wish their Wills to mirror each other can complete just one questionnaire with all the details, but should feel free to complete separate questionnaires if they prefer.*

<b>Personal Details</b>		
<b>1</b>	<b>2</b>	
Surname	Surname	
All forenames	All forenames	
Any other name you use or have used	Any other name you use or have used	
Date and place of birth	Date and place of birth	
Nationality	Nationality	
Occupation	Occupation	
Address	Address	
Tel (day)	Tel (day)	
Tel (mobile)	Tel (mobile)	
Email	Email	
<b>Married couples and civil partners</b>		
Date and place of marriage or civil partnership		
Did you sign a pre-nuptial agreement?	Yes	No
Details of any previous marriages or civil partnerships		
<b>Unmarried and non-civil partner couples</b>		
How long have you been together?		
Do you intend to marry or become civil partners in the near future?	Yes	No
Did you sign a cohabitation or similar agreement?	Yes	No
Details of any previous marriages or civil partnerships:		

**Family details (Please continue on an extra sheet of paper if necessary)**

**Children (Please indicate if any is a child of just one of you, whether any have special needs and whether they are single, married, divorced or separated)**

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

**Grandchildren**

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Details of any dependants other than children or grandchildren:

**Funeral wishes**

You may specify in your Will whether you wish to be (please tick):

Buried

Cremated

No preference

Do you have any other wishes or preferences regarding your funeral arrangements, or about the use of your body for, say, organ transplantation or medical research?

**Executors and Guardians**

You must appoint executors to carry out the instructions 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 in our firm will be pleased to act as your executors, either alone or with a member of your family or friend. Executorship involves responsibility and you should ask the people you would like to act before naming them in your Will.

Full name:

Address:

Full name:

Address:

Full name:

Address:

Would you like the partners from our firm to act as your executor(s)?                      Yes                      No

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if both you and the other parent have died. If you are a single parent, divorced from the other parent or a same sex couple, special rules may apply and you should discuss this with us.

**Please list chosen guardians:**

Name:

Address:

Name:

Address:

## Beneficiaries

The main part of your estate is called “the residue”. This is dealt with in the next section. Before giving away the residue, you may wish to make gifts of cash or personal belongings to individual children, grandchildren, friends or charities.

You may also wish to consider a gift or trust as a tax-planning measure; if so, please discuss this with us.

### **Cash gifts:**

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

Name:

Name:

Address:

Address:

Amount:

Amount:

Name:

Name:

Address:

Address:

Amount:

Amount:

Name:

Name:

Address:

Address:

Amount:

Amount:

### **Gifts of articles:**

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the item to allow it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he/she will not be given a substituted item or the cash equivalent, unless you specify this in the Will.

Name:

Name:

Address:

Address:

Item:

Item:

Name:

Name:

Address:

Address:

Item:

Item:

Name:

Name:

Address:

Address:

Item:

Item:

**The residue:**

This is all that you own, with the exception of jointly-owned property and the cash gifts and gifts of articles set out above. Please state who is to receive the residue on your death and who is to receive it of that person should die before you.

The following are the more common provisions:

a) Everything to my husband/wife/partner outright, but if he/she has died then to my children equally: Yes / No

b) Everything equally to my existing children, and to any other children I might have:

Yes / No

Please tick at what age you would like your minor child/ren to acquire their share?

18  21  25  Other (please specify): \_\_\_\_

If there are gifts to children, you may wish to specify that if any of them should die before you, leaving children of their own, then those children will inherit their parent's share of the residue.

Yes / No

Please choose what at what age (please tick)?

18  21  25  Other (please specify): \_\_\_\_

c) Everything to my husband/wife/partner, but if he/she has died, to the person(s)/organisation(s) named below. Yes / No

d) If none of the above options is appropriate, please set out below who is to receive the residue? Yes/ No

Persons/Organisations

Name:

Name:

Address:

Address:

Share (%):

Share (%):

Name:

Name:

Address:

Address:

Share (%):

Share (%):

Name:

Name:

Address:

Address:

Share (%):

Share (%):

Name:

Name:

Address:

Address:

Share (%):

Share (%):

Name:

Name:

Address:

Address:

Share (%):

Share (%):

**FAILURE:**

If you and your immediate family should die in a common accident, where would you like your estates to go? Would you want half to go to your family and half to that of your spouse/partner?

Yes / No

Please give a brief outline of your requirements

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**Assets and liabilities (Please continue on an extra sheet of paper if necessary)**

Please summarise your assets and any liabilities (with approximate values) as indicated. In the case of couples, please distinguish between what belongs to each spouse or partner and what is owned jointly using the different columns

	In sole name	In joint names
<p><b>Your home:</b></p> <p>Address:</p> <p>Value:</p> <p>Freehold or leasehold:</p> <p><b>Any other houses or flats, land or buildings:</b></p> <p>Address:</p> <p>Value:</p>		<p>If your home is owned jointly, is it held as joint tenants or tenants in common?</p>
<p>Freehold or leasehold:</p> <p>Address:</p> <p>Value:</p> <p>Freehold or leasehold:</p> <p><b>Mortgages:</b></p> <p>Property:</p> <p>Lender:</p>		<p>If the property is owned jointly, is it held as joint tenants or tenants in common?</p> <p>If the property is owned jointly, is it held as joint tenants or tenants in common?</p>



Amount outstanding:

Property:

Lender:

Amount outstanding:

**Life insurance  
(please indicate if  
any insurance is  
linked to a  
mortgage):**

Provider:

Life/lives assured:

Value:

Provider:

Life/lives assured:

Value:

**Pensions:**

Provider:

Value:

Provider:

Value:

**Bank and building  
society accounts:**

Bank/building society:

Value:

Bank/building society:

Value:

Bank/building society:

Value:

**Stocks and shares  
etc:**

Value of portfolio:		
<p><b>Other assets (e.g. cars, yachts, antiques, jewellery etc):</b></p> <p>Description:</p> <p>Value:</p> <p>Description:</p> <p>Value:</p> <p><b>Other liabilities (e.g. loans, credit cards etc):</b></p> <p>Creditor:</p> <p>Amount outstanding:</p> <p>Creditor:</p> <p>Amount outstanding:</p>		

**Other matters**

Have you made any gifts in the last seven years?	Yes	No
Do you have an interest in any trusts or expect any inheritance?	Yes	No
Do you live in any country outside the UK? Or is there any other country with which you are closely connected*?	Yes	No
Do you own a business or are you a partner in a business? Or Do you own any private company shares or agricultural property?	Yes	No
Do you know of any problems which may arise about your Will(s) or in the family generally?	Yes	No
Do you have an insurance policy on your life or your life and the life of another which would mature on the survivor's death could be written in trust to fund Inheritance Tax (or provide other Inheritance Tax-free money) for your children?	Yes	No

Please give details if you have answered "Yes" to any of the questions above:

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\*Please ensure that you deal with any assets you have outside the UK in its respective jurisdictions/country by instructing a foreign lawyer to advise you accordingly.

**Other Wills and documents**

*Please provide a copy/copies of any existing Will(s)*

Where is/are the original(s) located?

Have you made an Enduring Power of Attorney or a Lasting Power of Attorney?	Yes	No
Would you like to grant Lasting Powers of Attorney so that members of the family or others whom you choose could deal with your affairs in your later years	Yes	No
Do you have a Living Will (Advance Directive)?	Yes	No

**CONFIRMATION OF INSTRUCTIONS**

I/We confirm that the instructions we have given represent our intentions in relation to my/our Will(s).

I/We hereby instruct Jackson Longe Solicitors to prepare our wills on the basis of these instructions.

Mr/Mrs/Miss/Other

Mr/Mrs/Miss/Other

Full Names.....

Full Names.....

Signature .....

Signature.....

Date.....

Date.....

**General Information:**

1. *A will is usually completely cancelled if you get married after making it. You will need to make another will immediately, or one which takes a forthcoming marriage into account and so please do inform us if you are intending to get married in the near future.*
2. *On divorce, gifts to your husband/wife are cancelled as is his/her appointment as 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 provision for a 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. *Couples who wish their Wills to mirror each other can complete just one questionnaire with all the details, but should feel free to complete separate questionnaires if they prefer.*
5. *Please feel free to ask for our help or advice or more information on any topic related to your Will.*