

WILL QUESTIONNAIRE FORM

Prepared by

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KEY WORDS

ESTATE	The value of all your possessions including your house, car, valuables, insurance, benefits, shares etc.
INTESTATE	Someone who dies without making a valid Will.
EXECUTOR/EXECUTRIX	Appointed by you in your Will to carry out your wishes. Males are called <i>Executor</i> and females are called <i>Executrix</i> .
TRUST	A trust is a gift to a person or persons or organisations with restrictions placed upon it. For example, you may want your spouse to receive interest on investments during his or her lifetime but want the capital of the investments to pass to your children when your spouse dies. This would result in a trust arising for the lifetime of your spouse. A trust will also arise if you leave gifts to minor children until they attain the age specified by you or by law.
TRUSTEES	Appointed by you in your Will to manage any Trusts created in your Will.
BENEFICIARY	Someone you give money or other property to in your Will.
GUARDIAN	A relative or very close friend who would actually bring up your children after your death.
INHERITANCE TAX	<p>Tax payable on the value of lifetime gifts and the value of your estate at your death.</p> <p>If your estate exceeds £275,000 (current inheritance Tax threshold), full tax advice can be given to mitigate the potential liability.</p>

COOLE+HADDOCK

WILL QUESTIONNAIRE FORM

Please complete this form with as much detail as possible, using additional sheets of paper if you do not have enough space or want to tell us about something we have not raised.

A : YOU AND YOUR FAMILY

1. Your Details:-

Full Name:

Address:

Telephone Numbers: Home
 Work
 Mobile

Date of Birth:

Place of Birth:

Are you Married / Single / Separated / Divorced / Co-Habiting

Date of Marriage:

Date of Divorce:

2. Your Partner's Details:-

Full Name:

Address:

Date of Birth:

3. Children

Full Name:

Address:

Date of Birth:

Full Name:

Address:

Date of Birth:

Full Name:

Address:

Date of Birth:

Please indicate if any of the children are not your partner's children or if any children are treated as children of the family but are not your own children?

4. Grandchildren

Full Name:

Address:

Date of Birth:

Full Name:

Address:

Date of Birth:

5. Parents

Full Name:

Address:

Date of Birth:

6. Additional Family Details e.g. step-children not mentioned above

Are you aware of anyone likely to challenge your Will? e.g. a former spouse; former partner or estranged child

B : ADMINISTRATION OF YOUR ESTATE

1. Have you already made a Will?

If Yes, where is this kept?

2. Who do you want to be your Executors? (The Executors are responsible for sorting out your estate.) You may choose up to four individuals.

**NOTE Beneficiaries can be and often are Executors.
If you would prefer to appoint a professional Executor, Coole+Haddock are very willing to provide this service.**

Full Name:

Address:

3. If the person(s) listed is/are unable to act, who would you wish to take their place?

Full Name:

Address:

C : GUARDIANSHIP

If you have children under the age of 18, who would you want to be their Guardian? It is usual to appoint an individual or perhaps a couple. Guardians assume day to day responsibility for the children until they reach 18 years of age.

Full Name:

Address:

Relationship to you of the person(s) listed:

D : FUNERAL WISHES

Do you have any specific funeral wishes?

E : GIFTS OF PERSONAL POSSESSIONS

Are there any gifts of items of property you would like to specify in your Will? Include details of any family heirloom or jewellery.

Item:

Full Name of Beneficiary:

Address:

Please continue on a separate sheet of paper if necessary.

F : CASH GIFTS

Do you wish to leave any specific amounts of money to anyone? Perhaps a family member, friends or a charity?

a)

b)

c)

d)

Please continue on a separate sheet of paper if necessary

G : REMAINING ESTATE

1. After payments of debts and legacies, who would you like the remainder of your estate to go to?

Full Name(s):

Address(s):

Relationship(s) to you (if any):

2. If any of the people you wish to inherit from you die within your lifetime, who do you wish to benefit instead?

Full Name(s):

Address(es):

Relationship(s) to you (if any):

3. If any of the beneficiaries of your Will are young children, at what age would you wish them to inherit? They will inherit at 18 unless you specify otherwise.

4. In the unfortunate event of one of your children dying during your lifetime, how would you wish any share of your estate that they would have inherited had they survived you to be distributed? For example, to remaining children or to pass to grandchildren (children of the deceased child)?;

H : DETAILS OF YOUR ESTATE

Please give details of your estate. It helps us to consider the appropriateness of the Will and advise you on any tax implications.

Principal residence:

Owned/rented?

If owned, approximate value of the whole property:

Mortgage:

Jointly owned?

If jointly owned, do you know whether you own as joint tenants or as tenants in common?

Additional Properties:

Address:

Value:

Address:

Value:

<u>Life Policies:</u>	Policy No.	Company	Value (approx.)
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Savings:

Shares:

Foreign Assets:

Pension:

Have you completed a valid form of nomination in relation to your pension whereby you specify who you would want to receive any amounts due under your pension in the event of your death?

Death-in-Service Benefits from Work

In the event of your death, would your employers pay any form of death-in-service benefit? If so, have you completed a valid letter of wishes indicating who you would like to receive the money?

Valuables:

If any of your assets are held jointly with another person, please confirm the name and address of that person and their relationship to you. Please also confirm whether you contributed to the purchase of the asset equally or it not, in what proportions did you contribute?

I : HOW DID YOU HEAR ABOUT COOLE & HADDOCK

Are you an existing client?

If not please tell us how you chose Coole & Haddock?

- Recommendation - by whom?
- Website
- Advertising
- Society of Trust and Estate Practitioners Directory
- Wills Week/Will Aid
- Charity Promotion – please specify which charity.
- Other – please specify