

Will Questionnaire

This is our standard Will Questionnaire.

Please only complete the sections which apply to your circumstances.

We are here to help you

If you have any questions about completing this questionnaire please call us on 020 3146 6300.

For a quick start

Please complete all relevant sections clearly and to the best of your ability.

Where there are circles, please tick:

When you have finished

Please check your responses carefully, then return this form to us.

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Our Reference:

020 3146 6300
hello@lauruslaw.co.uk

1. Your Details

Client

Spouse / Civil Partner

Title

Full Name

Have you ever used any other names?

Maybe you changed your name when you married? Please give details.

Address

Daytime Telephone Number

Mobile Number

Email Address

Occupation

If you have retired, write "retired", and give your previous occupation

Date of Birth

Marital Status

Please tick one

- | | |
|--|--|
| <input type="radio"/> Married | <input type="radio"/> Married |
| <input type="radio"/> Civil Partner | <input type="radio"/> Civil Partner |
| <input type="radio"/> Divorced or former civil partner | <input type="radio"/> Divorced or former civil partner |
| <input type="radio"/> Single | <input type="radio"/> Single |
| <input type="radio"/> Widowed | <input type="radio"/> Widowed |
| <input type="radio"/> Cohabiting | <input type="radio"/> Cohabiting |
| <input type="radio"/> Separated | <input type="radio"/> Separated |
-

Are you normally permanently resident in the UK?

- | | | | |
|---------------------------|--------------------------|---------------------------|--------------------------|
| <input type="radio"/> Yes | <input type="radio"/> No | <input type="radio"/> Yes | <input type="radio"/> No |
|---------------------------|--------------------------|---------------------------|--------------------------|
-

If 'Yes', which country do you live in?

- | | |
|--|--|
| <input type="radio"/> England | <input type="radio"/> England |
| <input type="radio"/> Scotland | <input type="radio"/> Scotland |
| <input type="radio"/> Wales | <input type="radio"/> Wales |
| <input type="radio"/> Northern Ireland | <input type="radio"/> Northern Ireland |
-

If 'No', which country do you live in?

2. Executors

Will Information

Have you previously made a will? Yes No

If 'yes' where is it kept?

* Please forward a copy of your current will

Executors

Choose between one to four executors. If there are child beneficiaries, you must choose at least two executors.

Appointing the firm as Executor

Would you like the firm to act as Executor? Yes No

Or

Appointing people you know as Executors

Name	Address	Relationship to you (if any)
1		
2		
3		
4		

Would you like this firm to act as Executor if these people can't (or don't want to) act? Yes No

If you do not want this firm to act, we strongly advise you appoint substitute executors. Please provide the details of a substitute Executor on a continuation sheet.

Note about fees: If this firm acts as executor, we will be entitled to charge additional fees to the estate for acting as executor and we will discuss these with you before we prepare the will.

If you want the firm to act as executor jointly with people you know, please get in touch and we can arrange that.

3. Children & Guardianship

Please note this section includes step-children and adopted children. If you do not have any children you can go to Section 4.

Name	Address	Date of Birth	Child or Step Child
1			
2			
3			
4			

Guardians

If you have children under the age of 18, you should appoint Guardians to look after them. Please provide the name and address of those you would like to appoint.

Full Name

Address

Relationship to you

Full Name

Address

Relationship to you

Do you wish to include a Letter of Wishes about Guardians for the children? This can include specifics in relation to their upbringing and provide guidance to your guardians.

Yes No

If you would like to appoint more than two Guardians and/or substitute Guardians, please provide their details on a continuation sheet.

4. Specific gifts in the Will (legacies)

You can gift specific items to individuals, charities or a class of people. If you do not make specific gifts, they will form part of your residue (discussed under Section 5)

a. Property

Please note, the term Property includes houses, flats, land etc.

Do you own a property?

Yes No

Land / Property Address (and Title Number if you have it)

Details of any mortgages

Is it owned solely (just by you) or jointly?

Solely Jointly Don't know

If jointly, as joint tenants or tenants in common?

Joint Tenants
 Tenants in Common
 Don't know

Gifts of Property

You can give property (for example a house) to someone as a gift.

These are specific gifts of land or property.

Please provide the details below, with a description of the land/property to be given away:

	Land / Property address (and Title Number if you have it)	Name and Address of the person receiving the gift	Relationship of that person to you (if any)
1	<hr/>	<hr/>	<hr/>
2	<hr/>	<hr/>	<hr/>
3	<hr/>	<hr/>	<hr/>
4	<hr/>	<hr/>	<hr/>
5	<hr/>	<hr/>	<hr/>
6	<hr/>	<hr/>	<hr/>

... 4. Specific gifts in the Will (legacies)

Giving someone the right to live in a property

You can leave a property to one person but allow another person to live in it. For example, you could give a house to your children but allow your husband, wife or partner to continue to live in it. You can decide if that person can live in the property for their whole life or if the right ends if they remarry or cohabit for a certain amount of time.

If you would like to give someone the right to occupy, please provide details below:

Full name of occupant

Male Female

Address of property

If this person remarries or cohabits after your death should the right to occupy end?

Yes No

There are many variations on this. For example, you might want to allow them to sell the house and buy something smaller without losing their right to occupy. If you want to make these sorts of provisions, you will need to talk to us about it.

Please tick here

... 4. Specific gifts in the Will (legacies)

b. Specific Legacies

A specific legacy means leaving something specific to someone, rather than just a cash sum payable out of the general estate such as jewellery, vehicles or items of sentimental value.

Describe what you mean in your own words and be careful to make sure everything is clear and unambiguous. If you have similar items make sure that you clearly identify both the gift and the person receiving it.

Choosing someone to distribute your items for you

You can choose someone to distribute items for you at their discretion, where you want people to be able to choose; for example you could give all your jewellery to your daughter to distribute amongst the family.

Description of gift

Beneficiary Name

Beneficiary Address

Relationship to you

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'yes' please provide details below.

Yes No

Alternative Beneficiary Name

Alternative Beneficiary
Address

Relationship to you

... 4. Specific gifts in the Will (legacies)

Description of gift

Beneficiary Name

Beneficiary Address

Relationship to you

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'yes' please provide details below.

Yes No

Alternative Beneficiary Name

Alternative Beneficiary
Address

Relationship to you

Description of gift

Beneficiary Name

Beneficiary Address

Relationship to you

Would you like to make a substitute for this gift if that person is not alive to receive it? If 'yes' please provide details below.

Yes No

Alternative Beneficiary Name

Alternative Beneficiary
Address

Relationship to you

If you wish to make further legacies, please provide the details on a continuation sheet.

... 4. Specific gifts in the Will (legacies)

Choosing someone to distribute

Would you like to choose someone to distribute items for you? Yes No

You will have to provide a letter of wishes appointing that person. We will send an example letter of wishes to help you write this.

c. Cash Legacies to Individuals

This is where we record specific gifts of cash in the will. Please provide details of the people to whom you are making cash gifts, and the cash sum amount that you would like to leave.

You can also specify that the children, or minors, receive their gifts when they reach a certain age, such as 21 or 25 years old. Please note, a child beneficiary will inherit at the age of 18, unless you say otherwise. If you want the children, or minors, to inherit upon reaching 18, please leave the "Age to receive gift" blank.

1. Gift Value £

Beneficiary Full Name

Beneficiary Address

Relationship to you

Age to receive gift

2. Gift Value £

Beneficiary Full Name

Beneficiary Address

Relationship to you

Age to receive gift

3. Gift Value £

Beneficiary Full Name

Beneficiary Address

Relationship to you

Age to receive gift

If you wish to make further legacies, please provide the details on a continuation sheet.

... 4. Specific gifts in the Will (legacies)

d. Cash Legacies to a Class

A class beneficiary is when you make a gift of the same amount of money to, for example, “the grandchildren”

The will would say something like “I leave £500 to each of my grandchildren living at the date of my death”

Please provide details of any gift of cash that you would like to leave to a class of beneficiary

Class Type <small>Such as Children or Grandchildren</small>	Amount	Age to receive
1	£	<input type="radio"/> Each <input type="radio"/> Total
2	£	<input type="radio"/> Each <input type="radio"/> Total
3	£	<input type="radio"/> Each <input type="radio"/> Total
4	£	<input type="radio"/> Each <input type="radio"/> Total
5	£	<input type="radio"/> Each <input type="radio"/> Total

e. Cash Legacies to Executors

Do you want to leave a cash gift to any executor provided they prove your will?

No

Yes, give each Executor who proves my will the same amount of £

Yes, give each Executor who proves my will the amounts I have set out below

1. Gift Value £

Executor Full Name

... 4. Specific gifts in the Will (legacies)

2. Gift Value £

Executor Full Name

3. Gift Value £

Executor Full Name

4. Gift Value £

Executor Full Name

Cash Legacies to Charities

Would you like to make any cash gifts to charity Yes No

If 'yes' please provide details below:

	Amount	Charity	Address	Registered Charity No.
1	£			
2	£			
3	£			
4	£			

The registered charity number is not essential but be careful to be specific if you do not have it because many charities have similar names.

You have to decide what you want to do about any Inheritance Tax. Charities don't pay Inheritance Tax, but your beneficiaries may have to, so you need to decide whether to pay charities their amount before or after tax:

- Give the legacy to charities before tax (which means charities get more because they don't pay tax).
- Give the legacy to charities after tax (which means charities get the same for their share as they would if they paid tax along with everyone else).

5. Distribution of Estate

What happens to the remainder of the estate after these legacies are distributed? The “residue” estate is what is left after the funeral expenses, debts, administration costs, taxes and legacies we have asked you about have all been dealt with.

If you haven’t given us any specific instructions in the earlier sections, the “residue” could be everything you own.

Remember to think about the “what if’s”. For example what should happen if someone was due to receive something but then dies before you? Does it go to their children? Or back to the estate to be shared out?

If there is no one to inherit, the official rules are applied and these often give a result you would not want. At worst, your estate could go to the Crown (which means the State).

Please also specify the age at which each beneficiary should inherit – a child beneficiary will inherit at the age of 18 unless you say otherwise. If the child is under-age their share will be held in trust until they reach the required age.

Question 1

Do you want to leave the residue first to your husband/wife/civil partner?

Yes

No, I do not want to leave the residue to my husband/wife/civil partner.

Question 2

If your husband/wife/civil partner dies before you, or you do not have a husband/wife/civil partner, or you are divorced or separated, would you like to leave your estate to your children?

a) I do not have any children. Now go to question 4.

b) Yes, I would like my children to inherit from my estate in equal shares at age

c) I would like my children to inherit the residue from my estate in unequal shares, as below

... 5. Distribution of Estate

Name	Address	Age to inherit (if applicable)	Share (% or fraction)
------	---------	-----------------------------------	--------------------------

d) I do not want my children/ my child to inherit the residue from my estate

Name(s) of children who will not inherit residue

If you have chosen c) or d) so that one child receives less than others, then you should write a letter to your Executors explaining why you have made this decision. The Executors' job is to carry out your instructions and wishes. The reason they need a letter of explanation if a child looks like they are receiving very little in your Will is to help your Executors if the child claims they should be entitled to more.

e) What happens if you have told us to leave something to a child and that child dies leaving children of their own? Normally, their share would pass down to their children, namely your grandchildren. Should we do that?

Yes No

Question 3

Do you want to make provision in your Will for the possibility that everyone chosen to inherit from your estate (above) might die before you?

Yes, Please give details in question 4

No, you have now completed the questions in this section. Please go to Section 6.

... 5. Distribution of Estate

Question 4

a) Do you want to leave the residue of your estate to particular people and/or charities?

Yes, Please give further details below. You can specify an age (say 21 or 25) at which people inherit, or leave those boxes blank if you want them to inherit at 18 years old.

No

Name	Address	Relationship to you <small>If applicable</small>	Age to inherit <small>If applicable</small>	Charity No. <small>If applicable</small>	Share %
					%
					%
					%
					%
					%
					%
					%

b) If you have chosen a charity above and that charity ceases to exist before you die, do you want your Executors to choose a charity, with similar aims and purposes, as a substitute?

Yes No

c) If you have chosen a person above and that person dies before you, do you want their share to be added to the shares of the other people and/or charities?

Yes No

If 'No', who do you want to inherit that share?

6. Last Few Questions

Funeral Wishes

Would you like your executors to arrange a Burial Cremation No Preference

Would you like your body to be made available for medical purposes after your death? Yes No

Would you like to include a Letter of Wishes, to be placed with your preferences for funeral arrangements Yes No

Trustees Powers

This applies only if there is a trust, otherwise you should ignore this question. If you have left anything to children under the age of 18, that automatically creates a trust under your will.

Trustees' powers are very limited by law and we strongly advise that you give them extra powers to help them to administer your Estate and any Trust. Please confirm that you are happy for such extra powers to be included.

Yes No

If you answer 'No' please phone us to discuss this further.

Other Information - Lifetime Gifts

Some people make gifts of money to beneficiaries in their Will while they are alive and then choose to reduce the gifts in the will by the same amount. They are treating the gifts made during their lifetime as a sort of advance against the inheritance. If so, would you want to take lifetime gifts into account and deduct them from the legacies that go to the beneficiaries after you die?

Yes No

If you answer 'Yes' please phone us to discuss the exact provisions that you require.

... 6. Last Few Questions

Your Estate

After taking into account any commitments such as mortgage, credit cards, forthcoming holidays etc., what do you think is the approximate value of your estate, including any foreign assets and liabilities.

Value £

Do you anticipate that your sole or joint estate will be more than £325,000?

Yes No

If so, your estate could pay Inheritance Tax. Please get in touch with us to discuss.

Do you own or run your own business or farm?

Do you own, have an interest in, or run a business or farm - either as a sole trader or with someone else?

Yes No

If so, your estate could pay Inheritance Tax.

If you answer 'Yes' please phone us to discuss the special provisions which relate to businesses and farms.

Special Circumstances

Are there any special family or personal circumstances we should think about? For example, a previous spouse and children or a disabled family member. If nothing is said in your Will about a significant family member or dependent, that person can make a claim against your estate. This includes your spouse, children and anyone being wholly or partly maintained (looked after) by you or who lived with you as husband or wife, although not married, for the two years before your death.

Yes No

Also note that legacies may affect the Social Security Benefits of a beneficiary so please tell us if any of your beneficiaries receive Social Security benefits?

Yes No

Have you told anyone that they will inherit from your estate when you die, but in fact, under the terms of your Will, they will not (either at all or to the extent promised)?

Yes No

If you have any questions, call us on 020 3146 6300

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... 6. Last Few Questions

Foreign Assets

If you have foreign property or possessions that you want included in your will, you will need legal advice so please get in touch with us.

Do you own any foreign property (houses, buildings, land etc.)? If so please give details below

Brief Details	Country	Value	To be covered in this will?
1			<input type="radio"/> Yes <input type="radio"/> No
2			<input type="radio"/> Yes <input type="radio"/> No

If you have any other assets abroad, please provide brief details and values, including the country where you hold those assets and whether you want your new will to cover them:

Brief Details	Country	Value	To be covered in this will?
1			<input type="radio"/> Yes <input type="radio"/> No
2			<input type="radio"/> Yes <input type="radio"/> No
3			<input type="radio"/> Yes <input type="radio"/> No
4			<input type="radio"/> Yes <input type="radio"/> No
5			<input type="radio"/> Yes <input type="radio"/> No
6			<input type="radio"/> Yes <input type="radio"/> No

... 6. Last Few Questions

Lasting Power of Attorney

If you become mentally or physically incapable of managing your affairs before you die, it's extremely useful to have a document called a Lasting Power of Attorney ready to appoint someone else automatically to be in charge of your affairs instead of you. This avoids an expensive and time consuming application to the Court of Protection for the appointment of a Deputy. We would strongly advise that you make a Lasting Power of Attorney. Please confirm whether you would like us to discuss these whilst dealing with your Will?

Yes No

Form Completed by

Date

Thank you for taking the time to complete the Will Questionnaire.

Upon receipt of the completed Will Questionnaire, we will contact you to confirm your wishes before preparing a draft Will for your consideration and approval. If you have any queries beforehand, please get in touch.

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020 3146 6300
hello@lauruslaw.co.uk

7. Continuation Sheet

Please use this page for any additional notes or information.

Where possible please refer to the page number to which this information relates.
