



WILL INSTRUCTION QUESTIONNAIRE

**Wills Jacobsen Legal
1 Broughton Business Centre
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www.willsjacobsen.co.uk

(1) Personal Details

Full names: You Title

Spouse/partner Title

Address:

Telephone numbers: Home
Work
Mobile

Date of birth:

Marital status: single/married/living with partner/divorced/widowed (please circle)

Occupation :

(2) Your children (if any)

Full names and addresses (if different from yours)

- | | | | |
|----|-------|----------------|-------|
| 1. | ..... | date of birth | ..... |
|  | ..... | marital status | ..... |
| 2. | ..... | date of birth | ..... |
|  | ..... | marital status | ..... |
| 3. | ..... | date of birth | ..... |
|  | ..... | marital status | ..... |
| 4. | ..... | date of birth | ..... |
|  | ..... | marital status | ..... |

(3) Other dependants who live with you

- | | | |
|----|-----------|----------------|
| 1. | Full name | date of birth |
| | | marital status |
| 2. | Full name | date of birth |
| | | marital status |

(4) Previous relationships and Previous Wills

Have you ever been previously married? Yes/No

If yes, please provide

1. the date of dissolution
 2. any previous names
 3. full names and ages of any children of that marriage
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-

Have you made a Will before? Yes/No

If so, where is the original?

(5) Domicile/Residency - General Notes

UK residents are liable to UK Income Tax on UK and foreign income.

- Non UK residents are subject to Income Tax only on the income arising in the UK and not that abroad.
- If you are resident in the UK but not domiciled in the UK then you pay tax on foreign income only in so far as it is brought into the UK.
- Residence and Ordinary Residence – the requirements laid down by the Revenue to determine whether or not you fall into either definition are complex and regrettably beyond the scope of this note.
- Domicile - is where you have your permanent home (i.e. your place of birth). Your domicile may effect taxes payable in the event of your death.

Domicile/Residency cont'd

- (a) Where are you resident for Income Tax purposes?
- (b) Where is your country of domicile?
- (c) To where do you intend to retire?
- (d) Is the Property to be covered by this Will.....
 - 1 Worldwide
 - 2 UK only (we recommend this as explained below)
 - 3 Other specifically

Please note – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we will either provide such advice for an additional fee or we will direct you to alternative specialist advice.

(6) General

Do any of the following affect you?

- a. IS YOUR ESTATE WORTH MORE THAN £325,000.00? Yes/No

Please note – It is possible that your estate will be subject to Inheritance Tax on your death and that the amount of tax charged will depend on the nature of the provisions contained in your Will. For this reason, advice on Inheritance Tax is commonly a feature of a comprehensive Will drafting service unless expressly excluded.

We will advise you as to the likely Inheritance Tax consequences of the provisions which you have asked us to include in your Will on the basis of the information which you have given to us. However, we will not advise you as to the most efficient method of drafting your Will or give advice in lifetime planning as part of our standard Will drafting service. However, if you ask us to do so we will provide such advice for an additional fee.

- b. ARE ANY OF YOUR BENEFICIARIES MENTALLY IMPAIRED? Yes/No

Please state their name(s) and age(s).

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- c. IF YOU ARE DIVORCED / SEPARATED / PREVIOUS CIVIL PARTNERSHIP.

Have your financial affairs been sorted out? Yes/No

d. IF YOU HAVE CHILDREN FROM A PREVIOUS RELATIONSHIP.

Are you keen to protect their interests? Yes/No

e. DO YOU HAVE ANY DEPENDENTS OTHER THAN CHILDREN?

E.G. Your Spouse, Former Spouse, Civil Partner, Former Civil Partner,
Co-Habitee, Elderly Relatives

Yes/No

Please give their full names and addresses

1 Full name

Address

2 Full name

Address

f. ARE THERE ANY DEPENDENTS YOU DO NOT INTEND TO PROVIDE FOR IN THIS WILL? Yes/No

If so please provide their full details:-

1 Full name

Address

2 Full name

Address

Please note – The Inheritance (Provision for Family and Dependents) Act 1975 may enable certain persons to seek additional provision out of your estate after your death. If an application is made under this act it is likely to involve your estate in expense and may result in a variation of the dispositions made in your Will.

If the information which you provide to us for the purposes of preparing your Will suggests that there is a real risk of such an application being made in respect of your estate, we will advise you that this is the case. However, we will not offer more detailed advice in relation to the 1975 Act unless you ask us to do so and, in those circumstances, an additional fee will be charged.

(7) Executors (FULL names and addresses)

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two (but you may not have more than four) 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 of our firm will be pleased to act as your executors, either alone or with a member of your family or a friend.

1. Executors full name

Address

2. Executors full name

Address

3. Executors full name

Address

4. Executors full name

Address

(8) Guardians for minor children (FULL names and addresses)

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 you and the child's other parent are both dead. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

Please specify two and their relationship to you (if any)

Try and ensure you do not appoint the same people as both Guardians and Executors to avoid a conflict of interest

1. Guardians full name

Address

2. Guardians full name

Address

Is there anyone who has been appointed by the Court as having "Parental Responsibility" for any child?

Yes/No

(9) Burial/Cremation wishes

Do you have cremation/burial wishes?

Yes/No

Details

Do you want the costs of any memorial to be paid for out of your estate?

Yes/No

(10) Legacies:

If you wish to make any gifts of personal chattels or set amounts of money, please give details below. Please give a full description of each article to enable it to be identified. Please use an additional sheet of paper if more space is needed.

1. Recipient's full name

Address

item/amount

2. Recipient's full name

Address

item/amount

3. Recipient's full name

Address

item/amount

4. Recipient's full name

Address

item/amount

5. Recipient's full name

Address

item/amount

(11) Residuary Estate

After paying any debts/funeral expenses and legacies, what do you want to happen to the remainder of your estate (known as “the residue”) ? E.g. all to spouse/partner and then equally to children.

If a beneficiary dies before you, what do you want to happen to their share? Would you, for example, wish the share to pass to his or her children?

Have you made any promises to anyone about what they may inherit from you? If so, please give full details.

Have you made any gifts of cash or property exceeding £3,000 per annum in any one of the last seven years? If so, please give full details of the asset/amount and the name and address of the recipient and the date of the gift.

Please provide us with any other information you feel may be relevant or make a note of any queries you may wish to raise with us:-

Assets/Liabilities Schedule

To assist us in advising you whether there are any steps you can take to reduce or minimise any liability to Inheritance Tax, please list your assets and liabilities (with approximate values where known), adding any others that are not mentioned below.

	You £	Spouse or partner £	Joint Names £
Main residence			
Any other property (is this tenanted?)			
House contents, car & personal effects			
Stocks and shares quoted on the London Stock Exchange			
Unit Trusts and Investment Trusts			
Unquoted Shares e.g. in a family company			
Building Society accounts			
Bank deposits			
Tessas, PEPs and ISAs			
National Savings accounts or bonds			
Death in service benefits			
Company pension scheme death benefits? E.g. widows and orphans			
Life policies			
Pension Policies			
Interests under another Will			
Any other assets			

Liabilities			
Mortgage			
Any other liabilities			

PLEASE SIGN

I/We have given the relevant information you need to know to make a suitable Will for me. I understand that if I/We have any special requirements you will be willing to offer this at an additional charge. Please prepare a Will for me/us based on the information I/We have given.

When the instructions are joint would each person please sign

Signed

Signed

Please circle the services below where Wills Jacobsen could be of assistance to you

Probate

Claims against the Estate of a Deceased

Mental Capacity Issues

Powers of Attorney

Trusts

Inheritance Tax

Asset & Wealth Protection