

## WILL QUESTIONNAIRE

### PART 1 - YOUR PERSONAL INFORMATION

1. Please enter your full name and contact details below?

Name		Date of Birth	
Are you known by any other name? If so enter here		Home Phone No	
		Mobile Phone No	
Current Address		Previous Address <i>(if you have lived less than 2 years at current address)</i>	
Postcode		Postcode	
Email address			

2. What is your marital status?

Married       Civil Partnership       Single       Cohabitee       Widowed

If married or in a civil partnership, please enter the name of your partner on the line below:

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3. If you have any children please list here their names, address, ages.

Name	Address	Age

*NB. If you have more than 3 children, please complete their details on the notes page provided at the end.*

4. Do you have any life assurance policies?

Yes       No

5. Do you own the property in which you live?

Yes       No

6. Do you own any other property in the United Kingdom?

Yes

No

If yes, please provide the full address below:

Property Address	
Postcode	

NB. If you own more than one property in the UK please complete their details on the notes page provided at the end.

7. Do you own property abroad?

Yes

No

NB. - If a foreign property forms part of your estate, leaving a foreign property in an English Will does not always effectively transfer the property and the relevant foreign tax system needs to be considered. We will need to discuss this at our meeting.

PART 2 – DETAILS OF YOUR WILL

Executors of your Estate

It is the job of your executors to manage your affairs after you have died. This includes arranging the funeral, preparing tax returns, collecting in your estate and ensuring it is distributed to those you have named as beneficiaries.

NB. Unless you are using a solicitor, it is usual to appoint at least two executors. This is in case one cannot act, or there are gifts to children which need to be held in trust for them.

It is common to include your spouse or civil partner as one of your executors, unless your financial affairs are complex, or you do not wish him/her to be involved in the administration of your estate.

8. Please complete the name and contact details below of the person(s) you wish to appoint as executors of your will.

1 <sup>st</sup> Executor Details			
Name		Home Phone No	
Address		Mobile Phone No	
		Email Address	
Postcode			

2 <sup>nd</sup> Executor Details			
Name		Home Phone No	
Address		Mobile Phone No	
		Email Address	
Postcode			

NB. If you wish to appoint more than 2 executors for your will please complete their details on the notes page provided at the end.

## Guardians of your Children

9. Do you wish to appoint a guardian for any of your children who may be under 18 when you die?

Yes

No

10. Please complete the name and contact details below of the person(s) you wish to appoint as guardian(s) of your children.

1 <sup>st</sup> Guardian Details			
Name		Home Phone No	
Address		Mobile Phone No	
		Email Address	
Postcode			

2nd Guardian Details			
Name		Home Phone No	
Address		Mobile Phone No	
		Email Address	
Postcode			

## Your wishes in relation to disposal of your Body

11. You have the opportunity here to state whether you wish to be buried, cremated or donate your body to Medical Science, but you do not have to state a preference. What would you like to choose?

Cremated

Burial

Medical Science

No Preference

## Distribution of your Estate

*If you do not make provision for someone who is dependent on you, they may bring a claim against your estate. Please let us know if you think this may be relevant to you.*

Please tick here to confirm you understand this

12. Is the value of all your property (houses; savings; pensions; investments less any debts) worth more than £325,000?

Yes

No

**NB. If yes** – Usually any estate worth more than £325,000 faces a bill for Inheritance Tax. We can minimise the Inheritance Tax on your estate and assist you in sound tax planning.

13. Do you wish to leave any gifts to Charity?

Yes

No

If Yes, please provide details (including amount or percentage of gift) of the Charity or Charities overleaf:

1 <sup>st</sup> Charity Details		2 <sup>nd</sup> Charity Details	
Name		Name	
Address		Address	
Postcode		Postcode	
Amount or % of gift		Amount or % of gift	

NB. If more than two charities are to receive gifts of money, please complete their details on the notes page provided at the end.

14. Do you wish to leave any other gifts of money?

Yes

No

If Yes, Please complete the details below of the person(s) to whom you are giving a gift of money?

1 <sup>st</sup> Person Details		2 <sup>nd</sup> Person Details	
Name		Name	
Address		Address	
Postcode		Postcode	
Relationship to you		Relationship to you	
Amount of gift?		Amount of gift?	

NB. If more than two people are to receive gifts of money please complete their details on the notes page provided at the end.

15. Do you wish to leave any specific items?

Yes

No

Please complete the details below of the person or people you wish to give specific item(s) to?

1 <sup>st</sup> Person Details		2 <sup>nd</sup> Person Details	
Name		Name	
Address		Address	
Postcode		Postcode	
Relationship to you		Relationship to you	
Description of Gifted items		Description of gifted items	

NB. If more than two people are to receive specific items, please complete their details on the notes page provided at the end.

**16. To whom would you like to give your remaining personal possessions?**

Specifically named person  Spouse/Partner

If a specifically named person, please complete name and address details below:

Name	
Address	
Postcode	

**17. After distribution of the above monetary gifts and personal possessions, please indicate below how you wish the rest of your estate to be distributed (NB this is known as your 'Residuary Estate').**

- Spouse/civil partner/cohabitee absolutely if he/she survives me by 28 days, if not balance to named beneficiaries/children

**NB. "spouse absolutely":** if you wish to leave your entire residuary estate to your spouse. This means that your spouse will be entitled to receive all the capital within your residuary estate and all income derived from that capital and deal with both capital and income as they wish. If you die before your spouse, your residuary estate will be combined with their estate. The combined estate will follow the instructions detailed in your spouse's Will. It will not follow the subsequent instructions in your Will should they be different.

- Life interest to spouse/civil partner/cohabitee, then balance to named beneficiaries

**NB. 'spouse for life':** This means that a trust is created under which your spouse will be entitled during their lifetime to receive all the income derived from your estate.

- Named beneficiaries only

If appropriate, please indicate here the names, addresses and the percentage of your Residuary Estate that you wish to leave to named beneficiaries.

1 <sup>st</sup> Alternative Residuary Beneficiary Details		2 <sup>nd</sup> Alternative Residuary Beneficiary Details	
Name		Name	
Address		Address	
Postcode		Postcode	
Relationship to you		Relationship to you	
% of Estate?		% of Estate?	

**NB.** If more than two named beneficiaries are to receive a share in your Residuary Estate, please complete their details on the notes page provided at the end.

**18. If all the people you have just named, plus any children they may have had, pass away before you do, our Wills allow you to select your own alternative residuary beneficiaries, and this may be people, charities or political parties.**

Would you like to select alternative residuary beneficiaries?

Yes  No

If Yes, please indicate here the names, addresses and the percentage of your Residuary Estate that you wish to leave to your alternative residuary beneficiaries?

1 <sup>st</sup> Residuary BeneficiaryDetails		2 <sup>nd</sup> Person Details	
Name		Name	
Address		Address	
Postcode		Postcode	
Relationship to you		Relationship to you	
Amount of gift		Amount of gift	

NB. If more than two people are to become your alternative residuary beneficiaries please complete their details on the notes page provided at the end.

### PART 3 - ADDITIONAL INFORMATION

19. Would you like to be contacted periodically to give you the opportunity to review and change your Will?

Yes  No

20. Please tell us how you heard about Ebor Financial Planning?

Existing client  Recommendation  Google/Yahoo   
 Website  Newspaper/magazine  Other

21. Please let us know below what has prompted you to make your Will now?

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21. Would you like to receive your correspondence by email?

Yes  No

If yes, please ensure you have completed details of your email address at Question 1 of this form.

22. Would you like us to write to your Executors informing them of your will and including a guidance leaflet?

Yes  No

23. Please let us know below if there any other additional information not mentioned in this questionnaire you want to tell us about that may be relevant to your will.

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## ADDITIONAL NOTES

*If you have further specific items, monetary gifts, or people to add to any of the parts of this questionnaire please list them below. Please state the question number they relate to before you insert the details (see example below)*

### **Additions to question 17**

[insert the additional details that are required by this question]

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