
WILL QUESTIONNAIRE



Northgate House
Devizes
Wiltshire
SN10 1JX
Tel: 01380 733300
Fax:01380 733600

PERSONAL DETAILS	
Full name	
Address and contact number	
Date and place of birth	
Residence for tax purposes (if known)	
Domicile (if known)	England and Wales/Other (please specify)
SPOUSE'S DETAILS	
Spouse's full name	
Date and place of birth	
Domicile (if known)	England and Wales/Other (please specify)
Children: full names and dates of birth	
Please provide name and address details of any other dependants in the 'any other information' section at the back	
If one or more of your children is under 18 when both parents die, you need to consider appointing one or more guardians. Please give name and address details of your chosen guardian(s).	

ASSETS	
<p>Land and buildings (please provide brief description of property, estimate of value and details of any outstanding mortgages)</p> <p>Please also specify whether the land is held jointly e.g. with spouse and, if known, whether held as joint tenants or tenants in common</p> <p>If the property is held jointly please specify what proportion of the purchase price each party contributed</p>	
<p>Cash, including bank and building society accounts</p>	
<p>Investments</p>	
<p>Any personal items of particular worth (other than ordinary household goods)</p>	
<p>Life insurance (please provide details of policies and e.g. if whole life, endowment, etc as well as whether or not they are written into trust, if known)</p>	
<p>Pension policies (please also indicate whether death benefits are written into trust, if known)</p>	
<p>Are you entitled to any single farm payments?</p>	
<p>Details of any business interests</p>	

Details of any foreign property	
Additional relevant details: (e.g. are you a beneficiary under any trust? Do you expect to inherit any sums in the future? Are you a name at Lloyds? Have you made loans of any substantial sums?)	
LIFETIME GIFTS	
Have you made any lifetime gifts and, if so, how much was gifted and when? Do you envisage making lifetime gifts in the future? If so, would you wish these to be taken into account when distributing your estate, i.e. would you wish any child who had received a gift from you in your lifetime to receive a smaller share of your estate as a result?	
INCOME	
Annual earnings/Salary along with details of employer	
Investment income	
OUTGOINGS AND LIABILITIES	
Have you made any gifts in the last seven years?	
Do you have any substantial outstanding debts?	

FURTHER INFORMATION	
Have you made a Will before? If so, please supply a copy	
Have you given any general or Enduring Powers of attorney? If so, please supply a copy	
Executors: Please give name and address details of the people you would like to appoint to administer your estate after your death	
Would you like to include cash gifts in your Will, i.e. specific sums to relatives, friends or charities? If so please provide details here of the sum to be given with name and address details of each beneficiary	
Would you like to leave gifts of any personal items (jewellery, etc)? If so please provide details.	

<p>Distribution of your estate: Who would you like to benefit from the residue of your estate (that which is left after payment of any debts, taxes, funeral expenses and gifts of cash/items)?</p> <p>And who would you like to benefit if your first choice fails to survive you?</p>	
<p>Funeral wishes: Do you have any specific wishes that you would like recorded in your Will?</p>	
<p>PROFESSIONAL ADVISERS</p>	
<p>Please provide details, where appropriate, of the following:</p>	
<p>Bank</p>	
<p>Accountant</p>	
<p>Investment Adviser/ Insurance and Pensions Adviser (if different)</p>	

Any other information	
-----------------------	--