

QUESTIONNAIRE & PREPARATION NOTES FOR YOUR WILL



SMITH PARTNERSHIP
Solicitors

INFORMATION ABOUT YOU

Name: 1.
2.

Address:
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Postcode:

Telephone:

Home:

Work/mobile:

Email:

Occupation(s): 1. 2.

Employed/Self employed/retired/not employed:

(State which applies)

Date of birth: 1.
2.

Any disabilities:

Physical:

Mental/learning:

(This may be relevant to signing the will)



INFORMATION ABOUT YOUR FAMILY

Your present status: *(indicate which applies)*

Single/widowed:

Separated:

Divorced:

Married:

Registered partnership:

Cohabiting:

Remarried:

(Name of spouse and/or partner)
(if not already named)

(NB#:Please state if you have been previously married)

Are you intending to get married/registering a partnership soon?

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Children: *Please give full names, ages if under 18, addresses if different from yours, and if from different relationships, even if not to be included in the will.*

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Other family: *e.g. brothers/sisters/parents* *(just for background information)*

1.

2.

Any dependants: *Please give full names and addresses of anyone who is financially dependant upon you, including your children if applicable. **Consideration must be given to providing for dependants on death.***

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YOUR PROSPECTIVE INHERITANCE

House/flat:

Give details of address, approximate value, whether singly or jointly owned, and whether it secures a mortgage or loan and if so, how much.

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Other property/land:

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Savings/investments:

Please give details of savings and investments including nature of investment, how much (approx) and whether in sole or joint names.

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Life insurance policies:

Please give details of life/savings plan/endowment policies including amounts payable on death and whether in sole name, joint names or held on trust for a specific individual.

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YOUR PROSPECTIVE INHERITANCE (CONT)



Pension lump sums:

Please give details of your pension company (work or private) in particular whether there is a lump sum in-service death benefit payable and if so, how much and whether you have signed a letter of wishes or nomination form.

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Imminent windfalls:

(e.g. Prospective inheritance/redundancy payments) (this may affect potential inheritance tax liability.)

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Foreign assets:

(If you have property or assets abroad you will need to be advised specifically about this)

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Approximate total value of estate (or your combined estates):

(To check potential inheritance tax liability-you may be worth more than you think!)



INFORMATION TO BE PUT INTO THE WILL

Funeral wishes/Organ donation:

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Executors/trustees: *(If there are beneficiaries under 18/21 or the Will sets up a trust then you need at least 2 Trustees)*

Full names and addresses:

First choice:

Substitutes:

Guardians:

Full names and addresses:

First choice:

Substitutes:

Specific legacies: *(items)*

On 1st death:

On 2nd death:

Money legacies: *(Amounts) (Age limit if to minors)*

On 1st death:

On 2nd death:



INFORMATION TO BE PUT INTO THE WILL (CONT)

Your house/land: *(include any specific directions if appropriate)*

On 1st death:

On 2nd death:

Residue:

First choice beneficiaries:

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Substitutes:

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Additional directions (if any):

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