

WILL QUESTIONNAIRE



Thank you for instructing Rice-Jones & Smiths. In order for us to prepare your draft will please complete and return this questionnaire to:

David Kain
Rice-Jones & Smiths
7 Ely Place
London
EC1N 6RY

Or by email to david@londonrjs.co.uk

If you need any further space please attach additional sheets of papers as necessary. Upon receipt we will prepare your draft will, if you are unsure of how to answer any question please do not hesitate to contact us.

1. PERSONAL DETAILS

Your full name _____

Your partner's full name _____

Your full address _____

Postcode _____

Your contact telephone number(s) Daytime _____

Evening _____

Mobile _____

E-mail _____

Are you resident in the UK YES/NO*

Date of birth You _____

Your partner _____

Place of birth You _____

Your partner _____

Occupation You _____

Your partner _____

Marital status

Single / Co-habiting / Married or Registered Civil Partnership / Divorced / Widowed*

Have you been married before? YES/NO*

Are you intending to be married or to register your Civil Partnership? YES/NO*

Do you have any children?

YES/NO*

If so, please list their full names, addresses and ages. Please also indicate whether step-children or adopted children are included.

Do you have any grandchildren?

YES/NO*

If so, please list their full names, addresses and ages.

Is there anyone else who is financially dependent on you?

YES/NO*

If so, please list their full names and ages.

2. PERSONAL DETAILS

2.1. Your Funeral

Please indicate if you have any particular wishes e.g. Cremation/Burial/Type of service.

2.2. Organ Donation

Do you wish to donate organs of your body for transplantation of therapeutic purposes?

You: YES/NO*
Partner: YES/NO*

2.3. Executors

Who would you like to carry out the provisions of your Will? If your Partner is to become entitled to your whole estate, it is normal practice to appoint them to act as your sole executor. It is recommended that you also appoint two substitutional executors should your Partner be unable to act.

Your executors may be family or friends. Alternatively many clients choose to appoint professional executors such as Solicitors. Please indicate below if you would like us to advise you upon this.

Do you wish to appoint you Partner as your sole executor? You: YES/NO*
 Partner: YES/NO*

Please list full names, addresses and relationship to you of alternative of substitutional executors:

2.4. Guardians

If you have any children under the age of eighteen, then one or more guardians should be appointed to look after them.

Please list their full names, addresses and relationship to you:

2.5. Your Estate

Do you wish to leave any of the following:-

- a) Gifts of specific items
 eg. furniture, jewellery

Please describe each gift and list each beneficiary's full name and address.

Alternatively, you may prefer to list these gifts in a letter accompanying your Will which can be altered at any time without the need to rewrite your Will. If so, please state "LIST"

b) Cash legacies

Please indicate the amount and each beneficiary's full name, address and age if under eighteen. You may wish to leave a specific amount to a favourite charity.

Whom would you like to inherit the whole or the remainder of your estate?

Do you wish your partner to inherit the rest of your estate? You: YES/NO*
Partner: YES/NO*

In the event of your partner pre-deceasing you or if you do not wish your partner to inherit the rest of your estate, please indicate the full names, addresses, ages and share of each person you wish to inherit. Please also specify at what age any child named as a beneficiary shall inherit eg. 18, 21, 25.

If any of the named beneficiaries die before you leaving children, would you like their children to inherit in their place?

YES/NO

If so, at what age? 18 / 21 / 25* Other: _____

In certain circumstances where all the named beneficiaries have died before you it may be necessary to include a longstop provision. This may be a gift to a family member or friend or, if preferred, to a charity.

Please give details of the beneficiary you wish to include.

3. YOUR ASSETS

Please complete the attached schedule **as fully as possible**, before returning your completed questionnaire to us. This is so that we may advise you of your estate's potential Inheritance Tax liability.

SCHEDULE OF ASSETS

<u>Asset</u>	<u>In Your Name</u>	<u>In Partner's Name</u>	<u>In Joint Names</u>
<u>Value</u>	£	£	£
House			
Contents (market value not insurance/replacement value)			
Shares			
Bank & Building Society Accounts			
Foreign Assets			
Other Property eg. Business Assets Investment Value of Life Policies please also complete sum insured below			

