



Will Questionnaire

Please complete this questionnaire in CAPITAL letters.

**If you require any help filling in the questionnaire,
please call one of the team on 0161 928 7136.**

**Please return the completed questionnaire to
HHB LAW, Grosvenor House,
45 The Downs, Altrincham, Cheshire WA14 2QG**

WILL QUESTIONNAIRE

SECTION 1 - PERSONAL DETAILS

(A) YOU

Forenames.....	.....
Surname.....	.....
Address .....	.....
.....
.....
Postcode.....	.....
Telephone Number .....	.....
Date of birth .....	.....
Occupation .....	.....
Do you, or are you intending to, live permanently outside England and Wales?	YES <input type="checkbox"/> NO <input type="checkbox"/>
If YES please state where .....	.....
Do you have a will? If so, please bring a copy.	

(B) MARITAL STATUS

Single	<input type="checkbox"/>
Married	<input type="checkbox"/>
Civil Partnership	<input type="checkbox"/>
Co-habiting	<input type="checkbox"/>
Separated	<input type="checkbox"/>
Divorced	<input type="checkbox"/>
Widowed	<input type="checkbox"/>
Do you intend to marry/remarry/enter into a civil partnership in the near future?	YES <input type="checkbox"/> NO <input type="checkbox"/>
If YES please give details .....	.....

(C) YOUR PARTNER

Forenames.....	.....
Surname.....	.....
Date of birth .....	.....
Occupation .....	.....
Does your partner live, or intend to live, permanently outside England and Wales?	YES <input type="checkbox"/> NO <input type="checkbox"/>
If YES please state where .....	.....

(D) YOUR CHILDREN

(including children from a previous marriage or relationship, adopted children and stepchildren)

Full names, dates of birth and addresses if different from yours:

(1) Name
Date of Birth
Address
.....
(2) Name
Date of Birth
Address
.....
(3) Name
Date of Birth
Address
.....
(4) Name
Date of Birth
Address
.....

Are the children:

Children of you both? YES NO

Your stepchildren? YES NO

If NO please give details

.....

(E) GUARDIANS

If you have any children under 18 who is going to be their Guardian(s)? You can only appoint a Guardian if you have parental responsibility for the child and the appointment will usually only take effect if you and the child's other natural parent have both died. You should ask people to agree to take on this future responsibility before appointing them.

(1) Name
Address
.....
(2) Name
Address
.....

SECTION 2 - YOUR ASSETS

(A) YOUR HOME

Is your home:

Owned?

Rented?

Other?

If owned is it:

In your sole name? YES NO

In joint names with your partner? YES NO

In your partner's sole name? YES NO

Please give approximate value

£

Is your home subject to a mortgage? YES NO

If YES, what is the outstanding balance?

Will the mortgage be repaid automatically on your death? YES NO

(B) YOUR BUSINESS INTERESTS

Do you have a business or shares in a private company? YES NO

If YES what does the company do?

Is it:

A limited company?

A partnership?

In your sole name?

A trading company?

It would be helpful if you could bring with you/forward any Partnership Agreement or Shareholders Agreement, Memorandum and Articles of Association (if available)

We advise you to speak to your accountant prior to the meeting to discuss if there are any reliefs available against inheritance tax.

(C) OTHER ASSETS

Please give brief details below of your other UK assets including any which may be owned jointly, and give approximately values. Please also consider any death in service lump sums payable under your pension.

Asset	Owned by yourself		Owned by your spouse/partner		Jointly owned with your spouse/partner*	
	Description	Value	Description	Value	Description	Value
Principal residence						
Stocks and shares						
Total cash (e.g. at banks/building societies)						
Personal effects (e.g. contents of house, car, jewellery, collections)						
Life Insurance policies. Are they written in trust?						
Loans/mortgage (including those to members of your family)						
Have you made any substantial gifts?						
Pension arrangements – lump sum death in service benefit. Is it written in trust?						
Trust interests - are you a beneficiary under an existing trust?						
Total value of other assets that will form part of your estate						

*If joint owner is not your spouse/partner please list separately.

(D) YOUR ASSETS ABROAD

Do you have any assets outside the UK? YES NO

If YES, please list separately giving details

Have you made a will in relation to any assets outside the UK? YES NO

If YES, please provide a copy in English.

(E) LIFETIME GIFTS

Have you made any substantial lifetime gifts within the last 7 years including gifts into Trusts? YES NO

If YES, please list amount and date

.....
.....

SECTION 3 - EXECUTORS

Your Executor(s) will be responsible for collecting in the assets of your estate, paying debts, funeral expenses and taxes and distributing the balance in accordance with your instructions. They will also become Trustees of any part of your estate retained in Trust.

Your Executors should be adults you trust and who you believe will be willing and capable of accepting the responsibility when the time comes. You may appoint up to four Executors. Haworth Holt Bell can act as your Executor, either by itself or together with up to two individuals. You may appoint an executor/trustee who is a beneficiary of your estate.

(1) Forenames.....	.....
Surname.....	.....
Address .....	.....
.....
(2) Forenames.....	.....
Surname.....	.....
Address .....	.....
.....
(3) Forenames.....	.....
Surname.....	.....
Address .....	.....
.....
(4) Forename .....	.....
Surname.....	.....
Address .....	.....
.....

It would be preferable to let your Executors know they have been appointed and where your original Will is stored

SECTION 4 - BENEFICIARIES

You may wish to make specific gifts of cash or personal belongings or other assets.

(A) CASH GIFTS/OTHER ASSETS

Please give the name and address of the beneficiary together with the amount and the date of birth of anyone who is under 18. If you wish to make a gift to charity, it would be helpful if you could supply the charity's full name and registered charity number.

(1) Name

Address

Amount £.....

Item(s).....

(2) Name

Address

Amount £.....

Item(s).....

(3) Name

Address

Amount £.....

Item(s).....

(4) Name

Address

Amount £.....

Item(s).....

Are the gifts in (A) to take effect before the death of your partner? Yes No

(B) THE RESIDUE

This is the remainder of your estate after taking into account the gifts made in (A). Please state below who is to receive the Residue on your death and, if more than one, in what shares. You need to consider who should inherit if any of them die before you.

(1) Name
Address
Share %

(2) Name
Address
Share %

(3) Name
Address
Share %

(4) Name
Address
Share %

SECTION 5 – OTHER ISSUES

If you believe that any of the following statements may apply to you or there is anything you wish to raise with me please give brief details on a separate sheet.

1. Have you or your spouse/partner ever lived or do you intend to live outside the UK?
2. Are you or your beneficiaries in receipt of means tested benefits?
3. Are any of your beneficiaries about to marry / divorce or become bankrupt?
4. Is any family member or close relative not provided for in your Will?
5. Are you supporting or maintaining anyone who is not provided for in this Will?

SECTION 6 – FUNERAL ARRANGEMENTS

You may specify in your Will if you prefer:

- | | |
|------------------|--------------------------|
| Burial | <input type="checkbox"/> |
| Cremation | <input type="checkbox"/> |
| Organ donation | <input type="checkbox"/> |
| Medical research | <input type="checkbox"/> |

Please make your family/friends aware of your wishes.

SECTION 7 – GENERAL NOTES

1. The current Inheritance Tax threshold is available on Inland Revenue websites. Gifts to spouses/civil partners or charities are exempt but gifts on death outside these relationships are taxed at 40% on the excess over the threshold (different rules may apply if you or your spouse/civil partner are non UK nationals).
2. On marriage/civil partnership your Will is automatically cancelled unless your Will specifically states that it was made in expectation of your forthcoming marriage to that person.
3. On divorce/dissolution of civil partnership gifts to your spouse/civil partner and his/her appointment as an Executor are cancelled but the rest of the Will stands.
4. If you make no financial provision for a close relative or dependent, it is possible that he/she could make a claim against your estate after your death.