

Carter Read & Dove

SOLICITORS

Wills Questionnaire

Wills, something we always mean to do, but for various reasons never quite find the time to get round to doing it. Remember – only you can make your Will. If you do not do it, nobody can do it for you.

We at Carter Read and Dove Solicitors have devised a straightforward questionnaire for you to complete which will form the basis of your Will instructions. Naturally detailed discussions can take place to answer any questions or points requiring clarification. It is our intention to provide you with a tailor made Will specifically to suit your requirements and desires.

Remember if you do not make a Will your estate may not go to the people you wish to benefit, indeed by law, it could go to people you would wish not to benefit, or the government.

Will Details:

1. a) Your full name _____

Any aliases or names by which you are known _____

b) Your address _____

Telephone: Home: _____ Work: _____

c) Are you married to your partner? **Yes / No**

IF YES Please indicate the your partner's full name and the date of your marriage _____

IF NO Are you contemplating marriage in the near future? **Yes / No**

If so to whom: _____

(NB – Marriage revokes a Will unless the Will is made in contemplation of these events taking place. Divorce will mean that any gifts/legacy to a spouse which you subsequently divorce will be invalid)

2. Your Children

Please give the full names, dates of birth and address for each of your children from your current and previous relationships or marriages

	Name	Date of Birth	Address
a)	_____	_____	_____
b)	_____	_____	_____
c)	_____	_____	_____
d)	_____	_____	_____

3. Do you have any specific requirements for your funeral?

Cremation Yes / No

Burial Yes / No

If so, where? _____

4. Do you want to appoint guardians for your children if you, or their other parent, dies before they are 18 years old?

Yes / No

Names: _____

Address: _____

5. a) Who are to be your **Executors**? _____

(Executors Functions – collect your assets, pay your liabilities, and distribute your estate. Minimum of one, maximum of four e.g. your spouse, friends or relatives or Carter Read & Dove Solicitors)

Names: _____

Address: _____

b) Who are to be your **Trustees**? (If different from your Executors)

(Trustees Functions – invest your estate, or part of it until the event you decide occurs e.g. your children reach a stipulated age i.e. 21 years)

Names: _____

Address: _____

6. a) Do you own your own home? **Yes / No**

IF YES Please provide your address if different from above

b) Do you own any other properties? **Yes / No**

IF YES Please provide address of such property/properties

7. Please list your main assets other than properties mentioned in 6 a) and 6 b)

Assets	Approximate Value
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

8. Do you wish all/part of your estate to go to your spouse/partner, if they shall survive you by twenty eight days?

Yes / No

If so what percentage?%

(If you have answered 'yes' to the above, but in the event of your Spouse/Partner predeceasing you, or if you have answered 'no' please complete 7 to 9 below)

9. a) Do you have any jointly owned assets? **Yes / No**

IF YES Please provide general description, approximate value and the name/s of the owner/s _____

b) Do you own a business? **Yes / No**

IF YES Please state type of business and if it is a company, partnership or in your sole name

c) Do you have any assets abroad? **Yes / No**

IF YES Please give details _____

NOTE We would strongly advise that if you have any assets/property in a foreign jurisdiction, that you make a Will in that jurisdiction solely relating to those foreign assets/property therefore the Will that we provide pursuant to your instructions should be limited solely to your assets in the UK.

10. a) Do you wish to give specific items to individuals? (known as Specific Legacies)

Yes / No

If so, list the items and the full names and addresses of those who are to benefit

Names:	_____	_____
Address:	_____	_____
	_____	_____
	_____	_____
Description of Items:	_____	_____

b) Do you wish to leave cash or financial gifts to individuals or charities? (known as Pecuniary Legacies)

Yes / No

If so, list the items and the full names and addresses of those who are to benefit

Names:	_____	_____
Address:	_____	_____
	_____	_____
	_____	_____
Amount: £	_____	£ _____

11. Residuary Beneficiaries

(The residue is your remaining estate not disposed of by either specific items or the financial gifts above, after the payment of debts, funeral and testamentary expenses and inheritance tax (if relevant). The residue can be given to one person or among a group of people/charities, or a combination of both. It can even be divided into percentages leaving certain percentages to individuals or groups of people/charities e.g. 10% to Mrs A, 20% to Mr B, 70% to charity X. It must always add up to 100%)

Names:	_____	_____
Address:	_____	_____
	_____	_____
	_____	_____
Percentage:	_____ %	_____ %

Average Will preparation charge:

Single Will £100 to £150 (plus VAT)
Joint Wills £150 to £225 (plus VAT)

These costs reflect our Average charges for the vast majority of Wills we prepare for our clients, occasionally the costs quoted will be increased if your requirements provide for lengthy schedules or specific and/or pecuniary beneficiaries being mentioned in your Will, we will advise you of such costs before commencing the preparation of your Will.

Inheritance Tax

We can advise you on matters concerning inheritance tax and estate planning. If this service is required we charge an additional fee of £190 plus VAT per hour.

Do it today for your own peace of mind and your loved ones

**Carter Read & Dove
Solicitors**

Preparing today, your Will for the future

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