

**THIS QUESTIONNAIRE IS STRICTLY
PRIVATE AND CONFIDENTIAL**



WILL QUESTIONNAIRE

This is an important document which is needed to assist us in preparing your will. Please read it carefully and answer the questions in full. If you have any difficulty in dealing with the questions please let us know and we can give you help and advice.

Two partners can complete a single Questionnaire. There is plenty of space to set out separate instructions and wishes. If you prefer to complete separate Questionnaires please let us know or photocopy this Questionnaire before you complete it.

PLEASE ANSWER IN DARK INK USING CAPITALS
DELETE OR PUT "N/A" WHERE QUESTIONS ARE NOT APPLICABLE

SECTION 1 - PERSONAL DETAILS

▪ **Your Full Names**

(include your forenames)

You _____

Your partner _____

▪ **Your Full Address**

Include your postcode and telephone number.

Please include work telephone number if necessary

▪ **Your Dates of Birth**

You _____

Your partner _____

▪ **Your Occupations**

You _____

Your partner _____

▪ **Your Employers**

You _____

Your partner _____

▪ **Marital Status Please tick appropriate box**

Single

Married

Civil Partnership

Cohabiting

Widowed

- did your spouse utilise their inheritance tax allowance on death ? YES/NO

Divorced

Separated

Have you ever been married before?

▪ **Are You Intending To Be Married?**

Date of proposed wedding _____

Please note that if you get married your existing will becomes ineffective unless reference to the marriage is included in the will.

▪ **Details Of All Children**

Please give full names, addresses and ages.

Please state if only one of you is the parent of any child listed below.

▪ **Details Of All Grandchildren**

Please give full names and ages

Where possible we recommend that you and your partner appoint the same executors. This will simplify the administration of your estates if you die together, as the same executors will act for both of you.

- Do you wish the whole of your estate to go to your partner?

YES/NO

- If YES, your partner can be your sole executor. Do you agree?

YES/NO

- If you appoint your partner as sole executor, please also name two substitute executors who will act if your partner fails to survive.

EXAMPLE Please set out the details as follows:-

My Brother	14 Hound Street
Thomas William Smith	Maidstone Kent ME16 8JH

YOU

YOUR PARTNER

4. ALL TO SURVIVOR?

Do you wish to leave your whole estate to your partner?

YES/NO

- **IF YES**

Please state who you wish to inherit if your partner dies before you:-

- **IF NO**

Please state who you wish to inherit your estate:-

eg - x% to wife
y% to children

-
-
- If the people you have named above die before you leaving children, do you wish their children to inherit their share of your estate?

YES/NO

- Are any of the people you have named aged 18 or under?

YES/NO

If **YES**, who?

- At what age would you like any children named to inherit? eg:- 25, 21 or 18? We recommend 25 since funds will, in any event, be available for beneficiaries before this age but too much capital too soon may be unwise.
-

5. LONGSTOP - THIS IS AN IMPORTANT CLAUSE IN YOUR WILL

If all the people you have named above under question 4 died before you, who would you then wish to inherit? eg:- a charity. If you have named several people under question 4 all with children of their own, question 5 may be unnecessary.

If you survive your partner and have received their whole estate and you then subsequently die, consider benefiting your partner's family as well as your own. You may wish to split the estate into parts in both wills to cover this situation.

Full name and relationship to you

Address and share of your estate

6. CHATELS

Do you wish all your chattels (ie: personal goods, furniture, car etc) to go to your partner?

YES/NO

If NO, please specify to whom particular items are to pass. It is helpful to keep such a list as short as possible.

Description of chattel

Name (including forenames) and
address of beneficiary and
relationship to you

7. CASH GIFTS

- Do you wish to leave any money to named individuals? YES/NO
- If **YES**, please specify full names and addresses of individuals. If you wish to leave money to a charity, please include details here.

Unless you state otherwise, these gifts will not bear any inheritance tax payable on your death. Gifts to charities are exempt from tax in any event.

- Are these cash gifts to be paid even if your partner survives you? If **YES**, beware because they will be paid twice, ie on your death and your partner's death
- | | |
|-----------------------------|---|
| | YES/NO |
| Amount in words and figures | Name (including forenames) and address of beneficiary and relationship to you |

Are any of the people named above under 18? YES/NO

SECTION 3 – MISCELLANEOUS

- If your affairs are complicated by any of the following you should bring this to our attention:- Please tick appropriate box

1. Do you wish to leave money or assets in trust?
 2. Do you have any entitlement to death in service benefits or pension benefits on death?

 3. Are you or your spouse non-domiciled in the UK?
 4. Have you included beneficiaries with learning disabilities?
 5. Do you have any overseas assets?
 6. Do you wish to know about Lasting Power of Attorney forms?
- These can help you and your family if you lose mental capacity.

If you tick any of the above boxes, you may need our specialist advice.

SECTION 4 - INHERITANCE TAX

- When a person dies the value of his estate is calculated by considering the assets which he owned at the time of his death less any liabilities (for example gas bills, income tax etc). The balance is then subject to a charge to tax called inheritance tax. The following brief notes indicate the liability to tax which will arise on death:-

1. All lifetime gifts made within seven years of death (except for small gifts of £250, annual gifts of up to £3,000 and a number of other gifts) will be taken into account in calculating the size of a person's estate.
2. Most gifts between husband and wife are exempt from inheritance tax. Gifts between unmarried couples will be subject to inheritance tax.
3. Inheritance tax is charged at nil percent on the first £325,000 of a person's estate. Thereafter tax is charged at 40%.

When you have finished please both sign and date the Questionnaire

1. Signed _____ Dated _____
-

2. Signed

Dated

▪

Please return your Questionnaire in the envelope provided to:-

Brachers law
Sommerfield House
59 London Road
Maidstone
Kent ME16 8JH

Thank you.

TAX PLANNING

As part of the will planning exercise we recommend that you provide us with details of your assets and liabilities. We can then assess your financial position and where relevant, give you tax planning advice which may save you thousands of pounds.

If you do wish to receive tax planning advice please complete Appendix I and return with this Questionnaire.

I do wish to receive tax planning advice.

APPENDIX I

1. YOUR ASSETS

Please complete the Appendix as it helps us to consider whether you need advice which can lead to a considerable saving of tax. Please feel free to give estimated figures. Include jointly held property and state this clearly, where relevant.

- **Your home**

Split the values if the property is held jointly

You:	Your Partner:
Mortgage £	Mortgage £
Market Value £	Market Value £

Do you have an endowment mortgage?

YES/NO

If NO, do you have life cover for the mortgage?

YES/NO

- **Home contents**

You: £	Your Partner: £
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- **Car**

You: £	Your Partner: £
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- **Banks and Building Society Accounts (please specify if joint accounts)**

You:	Your Partner:
£	£

- **Shares and Securities**

You:	Your Partner:
£	£

- **Life insurance/pensions (other than mortgage endowment policies)**

You:	Your Partner:
£	£

▪ **Your Business (give details as above)**

You:	Your Partner:
£	£

▪ **Foreign assets**

You:	Your Partner:
£	£

▪ **Other assets** (please specify)

You:	Your Partner:
£	£

TOTAL £

TOTAL £

LIABILITIES

Your Liabilities - Total amount due

Value £

Total £

Your Partner's Liabilities - Total amount due

Value £

Total £

LIFETIME GIFTS

- Have you made any lifetime gifts within the last 7 years? YES/NO
- Ignore normal Christmas and Birthday gifts and exclude gifts to your spouse.

- Include gifts into trusts and the release of debts.

<u>Amount or description of gift</u>	<u>Name of person who received gift</u>
<u>approximate date</u> £	
_____	_____
_____	_____
_____	_____
_____	_____

Brachers law are regulated by the Law Society.

20 April 2009

Reference: