

Will Questionnaire

- If you are interested in preparing a new will, or amending an existing will, please complete this form to the best of your ability and return it to Glazer Delmar Solicitors.
- Please note that completion and return of this form does not impose any obligation on you to instruct this firm to prepare your will.
- We are happy to assist you in completing this form at no cost to you. Please do attach additional sheets to the form if you do not have enough space to state all your wishes.
- Once we receive the completed form we will be able to provide you with a quote for our fees for preparing your will. You can then decide whether you wish to proceed.

SECTION 1: YOUR DETAILS

Forenames:	
Surname:	
Address:	
Postcode:	
Telephone: (daytime) (mobile)	
Email:	
Date of birth:	
Occupation:	
Your marital status:	Please tick Single <input type="checkbox"/> Married <input type="checkbox"/> Registered civil partnership <input type="checkbox"/> Co-habiting <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/>
Have you made a will before either in this country or abroad? <i>(If yes, please confirm if you wish to revoke/change your existing will)</i>	
Have you made an enduring power of attorney or lasting power of attorney?	
Have you made a living will?	

SECTION 2: DETAILS ABOUT YOUR FAMILY

Partner's full name:									
Date of birth:									
Place of birth:									
Residence for tax purposes Nationality: Domicile:									
Children in your relationship	<table border="1"> <thead> <tr> <th>Full Name(s)</th> <th>Date(s) of birth</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>	Full Name(s)	Date(s) of birth						
Full Name(s)	Date(s) of birth								
Children of former relationship Any other dependents and/or former spouse or civil partner									

SECTION 3: APPOINTMENT OF GUARDIANS AND EXECUTORS

If you have children aged under 18 you should consider appointing a legal guardian to look after your children if you die. If you are married or have registered your civil partnership at the date of your death, the responsibility for your children would automatically pass to your spouse or civil partner. If you appoint a guardian in your Will, that appointment will only be effective if your spouse or civil partner dies whilst your children are under 18.

You may appoint one or more guardians in your Will. We recommend not more than two guardians.

Names & addresses of proposed guardian(s):	
Full name:	
Address:	
Relationship to you:	
Full name:	
Address:	
Relationship to you:	

Names & addresses of proposed executor(s):	
Please refer to the attached note regarding the appointment of executors as this may assist you in deciding who you would like to administer your estate on your behalf.	
Option 1: Glazer Delmar to be appointed as sole executors <i>(delete if not applicable)</i>	
Option 2: Glazer Delmar to be appointed as joint executors with (insert name/s) <i>(delete if not applicable)</i>	
Option 3: Other professionals	Please provide their name and address
Option 4: Non-professional executors	
1st choice	
Full name:	
Address:	
Relationship to you:	
2nd choice	
Full name:	
Address:	
Relationship to you:	
Option 5: Substitute executor	
Full name:	
Address:	
Relationship to you:	

SECTION 4: FUNERAL

Please state whether you would like to be buried <input type="checkbox"/> cremated <input type="checkbox"/> no preference <input type="checkbox"/>	
Please state any other wishes for your funeral <i>(eg details of particular burial plot, request for environmentally friendly funeral)</i>	

SECTION 5: YOUR ASSETS

Is your home	owned jointly / owned in your sole name / rented <i>(please delete as appropriate)</i>
Please provide the approximate value of your home (if owned)	£
Approximately how much is outstanding on your mortgage, if anything?	£
Is there a life policy assigned to the mortgage?	
Please provide approximate value of other assets you own	
ISAs/PEPs	£
Shares	£
Other investments/Unit Trusts	£
National Savings Certificates	£
Premium bonds	£
Life insurance policies	£
Pension policies	£
Death in Service Benefit	£
Other land/property in UK	£
Land/property abroad	£
Cash/investments abroad	£
Car	£
Other personal items of value	£
Are you the beneficiary of a trust fund?	
Do you expect to inherit any money/items of value in the foreseeable future?	
Any other assets	£
	£
Do you have any sizeable debts?	£
Have you made any cash gifts of more than £3,000 in the last 7 years?"	

SECTION 6: LEGACIES

Please continue on a separate sheet if necessary. There is no limit to the number of gifts that you may make in your will. You are able to give gifts to your executors and guardians if you so choose.

CASH GIFTS
Please provide name and address of the beneficiary/charity and the amount of the gift <i>(eg £100 to my niece Jane Smith of 100 London Rd, SE1, or £100 to charity – provide name)</i>

Please state if any of the intended beneficiaries are under 18 years old

GIFTS OF SPECIFIC ITEMS
Please provide name and address of the beneficiary/charity and a description of the item(s) to be gifted <i>(eg my gold locket to my daughter Jane Smith of 100 London Rd, SE1, or my house at 100 London Road, SE1 to my son James Smith)</i>

Please state if any of the intended beneficiaries are under 18 years old

REMAINDER OF ESTATE

This is called your “residuary estate” and is what is left in your estate after the payment of any taxes, funeral expenses, legal fees, debts due and any money or property has been gifted in accordance with any legacies.

It is important that you provide details of the people that you would like to inherit the remainder of your estate. We will discuss this part of your Will with you in detail.

Simple examples:
<ul style="list-style-type: none"> • to my husband, but if he dies before me, my estate to be split equally between my children • my estate to my grandchildren in unequal shares – 30% to Sue, 50% to John, 20% to Mary • the remainder of my estate to charity (provide name)

The names and addresses of anyone you would like to inherit the remainder	
Full name:	
Address:	
Relationship to you:	
Age:	
The share of your estate you would like them to receive:	

Full name:	
Address:	
Relationship to you:	
Age:	
The share of your estate you would like them to receive:	

Full name:	
Address:	
Relationship to you:	
Age:	
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Full name:	
Address:	
Relationship to you:	
Age:	
The share of your estate you would like them to receive:	

Please note that the contents of this questionnaire will enable us to quote you a fee for preparing your will. It will also act as an initial guide to us in taking instructions for the preparation of your will.

If you decide to instruct Glazer Delmar Solicitors to prepare your will we will take your full instructions on what you would like to include in your will and answer any questions you may have.

APPOINTMENT OF EXECUTORS

An executor is the person who will be responsible for administering your estate after your death. You may choose to have one executor, or more than one, up to a maximum of four.

It is important that you choose people that you trust as your executors. After your death it will be your executors who have legal control over all of your assets and responsibility for paying any debts due from your estate.

Your executors will be personally responsible for ensuring that a thorough valuation of your estate is obtained. They will be personally responsible for paying any tax due at your death. They will be personally responsible for carrying out the distribution of your assets in accordance with your will.

As there is some personal risk involved in being appointed as an executor, you should check with anyone that you propose to appoint as an executor to make sure they are happy to be appointed in your Will, before signing your Will.

If you have young children, or if your estate is large, you may be considering including clauses in your will to set up trusts. You may want to appoint your executors also to be your trustees. It is likely then that you would be advised to appoint at least two people.

The role of trustee may be an ongoing commitment for many years. Again trustees are personally responsible to the trust and to the people due to benefit from the trust fund and will have to prepare trust accounts. They may also need to prepare tax returns for the Inland Revenue. You should be sure that anyone you are considering appointing as a trustee understands that this may be a long term commitment and is happy to be appointed as a trustee in your Will.

If you do not believe that you know anyone within your family or a close friend who would be suitable to act either as an executor or a trustee then you may wish to consider appointing professional executors, such as solicitors or accountants.

If you would like to consider appointing Glazer Delmar Solicitors as executors and/or trustees in your Will, we would be happy to discuss with you our charging rates for carrying out this type of work.