



WILL QUESTIONNAIRE

Welcome to Alexander Lawyers specialist Will and Tax Planning Department.

Please use a separate questionnaire for each person wishing to make a Will. Once completed, please return this form to Dean Alexander, Alexander Lawyers LLP, Bervale House, 35-37 Moulsham Street, Chelmsford CM2 0HY, or email to Dean@AlexanderLawyersLLP.com so that a Will can be prepared for you.

Thank you for your instructions.

PART 1 – FAMILY DETAILS

Your Surname

Forenames

Address

.....

..... Postcode

Telephone Number

Mobile Number

E-mail address

Occupation

Do you have any assets in any different names. If so, please detail the name and assets. If this applies, you will need further advice on this point.

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PART 2 – YOUR HUSBAND/WIFE/PARTNER

Are you married or cohabiting? Yes/No

If so, please provide your partner's details below

Surname

Forenames

Date of Birth

Occupation

PART 3 – PARTNERSHIP/MARRIAGE DETAILS

Has your Partner been married before? Yes/No

If cohabiting, do you intend to marry shortly? If so, when?

.....

If this applies to you, you will require further advice.

If married, please provide year of marriage

Have you been married before? Yes/No

PART 4 – YOUR CHILDREN

Please provide full details of all your children from any marriage or relationship.

(a) Name

Date of Birth

Address

.....

.....

(b) Name

Date of Birth

Address

.....

.....

(c) Name

Date of Birth

Address

.....

If you are excluding any of your children from your Will, you will need advice on this point.

PART 5 – CHILDREN OF YOUR HUSBAND/WIFE/PARTNER

Please provide full details of any children of your Partner (unless detailed above)

(a) Name

Date of Birth

Address

.....

.....

(b) Name

Date of Birth

Address

.....

.....

(c) Name

Date of Birth

Address

.....

.....

For each please provide full name of other parent if not you:

Name

If you have illegitimate, adopted or stepchildren or a child who has died before you, you will require further advice.

PART 6 – YOUR ASSETS

Do you own the property in which you live? Yes/No

If no, who owns it?

If yes, do you own it

Solely
(please tick)

Jointly with another
(please tick)

If jointly, who is the other owner(s)?

.....

Approximate value £

Do you own any other property? Yes/No

If yes please detail

(a) Is it owned jointly? Yes/No

(b) If yes, who with

(c) Approximate value £

Please repeat for each property you own (please use a separate sheet if necessary)

Do you have a business? Yes/No

If yes, is it a company

A partnership

In your sole name?

Approximate Value £.....

Other than mentioned above please:

(a) provide a brief description of any other joint assets and their value

.....

.....

.....

(b) provide a brief description of any other solely owned assets and their value

.....

.....

.....

(c) provide a brief description of any foreign assets and their value

.....

.....

.....

If you own jointly held property or assets, foreign property or business interests you will need further advice.



WILL QUESTIONNAIRE

PART 7 – YOUR EXECUTORS

Your executors will carry out the instructions in your Will. You should have at least two executors. You can appoint people mentioned in the Will as beneficiaries (provided that they are adults) as your executors.

1. Would you like Alexander Lawyers LLP to act? Yes/No

2. If no, please provide details of your executors (no more than 4 and we suggest 2)

(a) Full name

Address

.....

.....

Relationship to you

(b) Full name

Address

.....

.....

Relationship to you

(c) Full name

Address

.....

.....

Relationship to you

(d) Full name

Address

.....

.....

Relationship to you

.....

PART 8 – GUARDIANS

If you have children you may wish to appoint guardians. Please provide details of the people you wish to appoint.

(a) Full name

Address

.....

.....

Relationship to you

(b) Full name

Address

.....

.....

If you are appointing guardians you will need further advice

PART 9 – FUNERAL ARRANGEMENTS

Do you wish to be

Cremated Buried No preference

If you have complex cremation or burial wishes or if you wish to leave your body in whole or in part for medical purposes you will require further advice.

PART 10 – CASH GIFTS & GIFTS OF SPECIFIC ITEMS

Do you wish to leave any cash gifts before dealing with the bulk of your estate (called the residue). If the intended recipients are under 18 a trust may be needed and you will need further advice.

Please detail the gifts and the recipients below

(a) Full name

Address

.....

.....

Amount: £

(b) Full name

Address

.....

.....

Amount:.....

(c) Full name

Address

.....

.....

Amount: £.....

If you wish to leave specific items (e.g. jewellery or furniture), please detail them below. Minor children cannot receive the items direct. If you want to leave items to children, you will need additional advice on this point. If you wish the items to form part of the residue then there is no need to refer to them specifically.

(a) Full name

Address

.....

.....

Article

(b) Full name

Address

.....

.....

Article

PART 11a – THE RESIDUE

This is everything except the cash gifts and the specific items you have referred to in part 10. In some cases the residue will not include joint property. You will need advice on this point if it applies to you.

The usual provisions are now detailed. Please choose one if it is appropriate to your circumstances. If not, please complete part B

I. Everything to my Partner named in part 2 outright, if he/she has died then to my children

If minors they can inherit at 18, 21 or 25 years. Please choose an age. If you require a later age you will need advice on this point.

II. Everything to my children equally at 18, 21 or 25 years old. Please specify age. If older than 25 years, you will require further advice

III. Everything to my Partner, but failing this to the persons, charities or organisations named below. Please specify shares if not equal

.....

.....

PART 11b

If none of the earlier options are appropriate, please specify the persons, charities or organisations to benefit from your estate and in which shares.

(a) Full name

Address

.....

.....

Share

If charity, charity number

(b) Full name

Address

.....

.....

Share

If charity, charity number

Notes to Will Making

1. Marriage automatically revokes a normal will. You will need another one immediately after marriage.
2. Divorce also affects a will and you will need to take advice if this applies to you.
3. If you have excluded any close relative from your will they may have a claim against your estate and you will need further advice.