

Will Questionnaire

Personal details				
Client 1		Full name (including middle names and any other names you are known by)	Client 2	
Yes <input type="checkbox"/>	No <input type="checkbox"/>	Existing Will	Yes <input type="checkbox"/>	No <input type="checkbox"/>
		Marital status (married, remarried, single, divorced, widowed)		
		Date of birth		
		Mobile		
		E-mail		
Home address				
Postcode:				
Home tel:				
Children and grandchildren				
Name		Child/ Grandchild	Date of birth	

Your Estate

Please set out the approximate value of your estate. Please indicate if any items are business or agricultural assets as this may be important for tax reasons. If the total value of your estate is greater than £325,000 then there may be some benefits in your considering tax planning and we would be happy to discuss this with you.

Assets (£)

Value of your home			
Is it freehold or leasehold?			
Is it mortgaged?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
If so, how much is outstanding?			
How is it owned?	Sole name	<input type="checkbox"/>	
	Joint tenants	<input type="checkbox"/>	
	Tenants-in-common	<input type="checkbox"/>	% %
Where are the deeds stored?			
Value of any other houses/land			
House contents			
Cars			
Jewellery			
Pensions			
Life policies			
Bank and building society accounts			
National Savings			
Shares and Investments			
Other (including any foreign assets and business property)			

Value of liabilities (£)	
Mortgage(s)	
Loans	
Overdraft	
Credit cards	
Other	
Funeral Wishes (optional)	
Do you have any specific wishes regarding funeral arrangements?	
I wish to be buried	Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/>
I wish to be cremated	Client 1 <input type="checkbox"/> Client 2 <input type="checkbox"/>
Any other requirements or requests that you would like to be mentioned in your Will	
Executors	
Executors are the people nominated to carry out the instructions of your Will. It is recommended that you have at least two executors, or at least a backup should your first choice be unable or unwilling to act. You can choose your partner as your executor. Kitcat & Co Solicitors are happy to act as executors alone or alongside the executors of your choice.	
1) Full name	
Address	
2) Full name	
Address	
3) Full name	
Address	
Guardians (optional)	
If you have children under the age of 18, you should name a guardian or guardians to take care of them should you and your spouse predecease them.	
Full name(s)	
Address	

Gifts

After any liabilities have been settled, the remainder of your estate will be divided between your residuary beneficiaries. Before this division, you may wish to leave specific gifts of cash or possessions to individuals or charities.

1) Full name	
Address	
Gift (item or £)	
2) Full name	
Address	
Gift	
3) Full name	
Address	
Gift	
4) Full name	
Address	
Gift	

Your Residuary Estate

This is everything left over after you have made your specific gifts. Please indicate which options you wish to choose.

All to spouse/partner	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If spouse/partner dies then to children	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so at what age?		
Do you want your grandchildren to take their parents share if their parent dies before you?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If so at what age?		
Other beneficiaries (Full names and addresses)		

Special circumstances

It is sometimes necessary to incorporate in a Will some administration provisions to take account of particular circumstances and it is for the purpose of alerting us to any of these circumstances that the following questions are included. Please leave blank any questions that don't apply to you.

Have you ever been divorced?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you support any former spouse of children not resident with you?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any step-children?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you support anyone whose details do not appear elsewhere in this questionnaire?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Can you think of anyone that you are not including in your Will who might have a claim against your estate?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If you are not married, are you planning to marry?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you made any substantial gifts or loans?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If necessary, please expand your answers below or on a separate piece of paper.	