**Graham & Co. Solicitors Limited**

**Will Instruction Questionnaire**

Throughout the questionnaire, answer the questions if you can. Do not worry if you don’t know the answer but please don’t guess, just leave it blank. The form that accompanies this questionnaire should help to explain the questions and the options open to you. You are very welcome to telephone or call in if you need more assistance. Some of the questions will not be relevant to your personal situation as we use one questionnaire for all clients. If so, just mark the question “n/a”.

Please provide the following information by either ringing the suggested alternatives with a pen or writing the information in the space provided. (Please use Block Capitals)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1.** | **Your Details** | | | | | | |
|  | Your Full Name (Inc title) | | |  | | | |
|  | Any variations you have used | | |  | | | |
|  | Your Full Postal Address | | |  | | | |
|  | Telephone numbers | | Home: | | Work: | | Mobile: |
|  | Your date of birth | | | | | | |
|  | Your marital status | Single/Engaged/Married/Widow(er)/Living as Man & Wife | | | | | |
|  | Your Spouse/Partner’s full name | | | | | | |
|  | Any variation that they have used | | | | | | |
|  | His/Her date of birth | | | | | | |
|  | Does he/she wish to make a Will | | | | | Yes/No | |

|  |  |  |
| --- | --- | --- |
| **2.** | **Your Estate** | |
|  | The first thing you must consider is the size of your estate. Please set out on the following page the present values of your possessions. You do not have to worry about being strictly accurate, as we only need a rough idea for the purposes of deciding whether there are any benefits, which you might obtain by Tax Planning. | |
|  | 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 a tax planning scheme and we would be happy to discuss this with you before arranging for your draft Will to be prepared. | |
|  | Value of any houses or land you own | £ |
|  | Is it freehold or leasehold? | |
|  | Is it mortgaged? | |
|  | If so, how much is outstanding? | £ |
| Ho1 | Is it jointly owned? Yes/No  If so, Full name of Co-owner(s) and address(es) if not resident with you. | |
|  | Is it held as Joint Tenants or Tenants in Common? | |
|  | Value of any expensive personal possession | £ |
|  | Value of any Life Policies which will be paid out on your death | £ |
|  | Are any of these written in trust? | |
|  | Value of all Building Society, Bank or other Investment Accounts which you have both in sole or joint names | £ |
|  | Value of any stocks or shares which you own | £ |
|  | Value of any other valuable items which you may own | £ |
|  | Total | £ |
|  | If there is insufficient space above to show all of your assets or to distinguish between those in sole or joint names, please attach a separate sheet. | |

|  |  |
| --- | --- |
| **3.** | **Your Family** |
|  | Please set out below the full names and dates of birth of your children together with the names and ages of your grandchildren if applicable. It can often be of great assistance to us in considering the terms of your draft Will to see a simple diagram of your family tree. This is especially useful if your family is large or you wish to include brothers/sisters and their children or grandparents in your bequests or appointments as Executors or Guardians. |
|  | Children |
|  | Grandchildren |

|  |  |
| --- | --- |
| **4.** | **Agreements & Court Orders** |
|  | Is there any Court Order or formal or informal Agreement in existence regulating your relations with any person? If so, please supply a copy. |

|  |  |
| --- | --- |
| **5.** | **Appointment of Testamentary Guardians** |
|  | These are the people you wish to appoint to care for your children in the event of joint death |
| Gu 1 | Name |
|  | Address |
|  | Relationship (if any) to you |
| Gu 2 | Name |
|  | Address |
|  | Relationship (if any) to you |

|  |  |  |
| --- | --- | --- |
| **6.** | **Executors & Trustees** | |
|  | These are the people who are responsible for making sure the terms of your Will are carried out | |
| Ex 1 | First Executor’s name  and address | |
| Ex 2 | Second Executor’s name  and address | |
|  | If either of the above Executor’s are unable to act for you do wish to appoint an alternative? This can be another individual or the partners of Graham & Co. Solicitors Limited | |
| Ex3 | Alternate Executor’s Full name  and address | |
|  | Executor’s relationship to you (if any) | |
|  | I would like the partners of Graham & Co. Solicitors Limited to be my executors | Yes/No |

|  |  |  |
| --- | --- | --- |
| **7.** | **Gifts of Money** | |
|  | Do you wish to make any gifts of money to any person or institution? | |
| Pec1 | Name & address of person or body | Amount in £’s |
| Pec2 | Name & address of person or body | Amount in £’s |
| Pec3 | Name & address of person or body | Amount in £’s |
| Pec4 | Name & address of person or body | Amount in £’s |

|  |  |  |
| --- | --- | --- |
| **8.** | **Gifts of Things** | |
|  | Do you wish to make any gifts of particular things to person or institution? | |
| Sb1 | Name & address of person or body | Description of item |
| Sb2 | Name & address of person or body | Description of item |
| Sb3 | Name & address of person or body | Description of item |
| Sb4 | Name & address of person or body | Description of item |

|  |  |  |
| --- | --- | --- |
| **9.** | **Gifts to Charity** | |
|  | Do you wish to make any gifts of money or things to a Charity? | |
| Pec1 | Name & address of Charity | Amount in £’s or description of item |
| Pec2 | Name & address of Charity | Amount in £’s or description of item |
| Pec3 | Name & address of Charity | Amount in £’s or description of item |
| Pec4 | Name & address of Charity | Amount in £’s or description of item |

|  |  |  |  |
| --- | --- | --- | --- |
| **10.** | **Your residuary estate** | | |
|  | This is everything left over after you have made your particular gifts. Please indicate which options you wish to choose. | | |
|  | 1. | All to Spouse/Partner | Yes/No |
|  | 2. | If Spouse/ Partner dies before you then to children | Yes/No |
|  |  | If so at what age? | |
|  | 3. | Do you want your grandchildren to take their parents share if their parent dies before you? | Yes/No |
|  |  | If so at what age? | |
| Rb1 | 4. | Some other beneficiaries? Their full Names & addresses | |
|  | *Longstop provisions* | | |
| .  Ls1 | Do you wish to make any provision for the disposal of your estate in the event that you are not survived by any of the above-mentioned persons? If so please give their full names and addresses | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **11.** | **Funeral Arrangements** | | |
|  | Do you have any specific wishes regarding funeral arrangements? You do not have to answer this question. | | |
|  | i | I wish to be buried | Yes/No |
|  | ii | I wish to be cremated | Yes/No |
|  | iii | Any other requirements or requests that you would like to be mentioned in your Will (i.e. organ donation, type of funeral, place of burial etc). Please specify below | |

|  |  |  |  |
| --- | --- | --- | --- |
| **12** | **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 me to any of these circumstances that the following questions are included | | |
|  | i | Have you ever been divorced? | Yes/No |
|  | ii | Do you support any former spouse or children not resident with you? | Yes/No |
|  | iii | Do you have any stepchildren? | Yes/No |
|  | iv | Is there anyone who could possibly inherit a share of your estate under the age of 18 years? | Yes/No |
|  | v | Do you support anyone whose details do not appear elsewhere in this questionnaire? | Yes/No |
|  | vi | Are you expecting to be married? | Yes/No |
|  | vii | Do you own any property abroad? | Yes/No |
|  | viii | Have you made a foreign Will? | Yes/No |
|  | ix | Do you have any shares in or are you a partner in a private business? | Yes/No |
|  | x | Have you made any gifts of property already? | Yes/No |
|  | xi | Do you have any substantial debts or liabilities? | Yes/No |
| If necessary, please expand your answers on a separate sheet of paper | | | |

|  |  |  |
| --- | --- | --- |
| **13** | **Will type** | |
|  | Do you wish your Wills to be mirror Wills? | Yes/No |
|  | Or mutual Wills | Yes/No |

|  |
| --- |
| We trust that this questionnaire is helpful in assisting you with regard to deciding how you wish your Wills to be drawn up. Please contact us if you have any queries. |

Graham & Co. Solicitors Limited

67 High Street

Herne Bay, Kent, CT6 5LQ