

Your Will Client Questionnaire

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of our firm, and your appointment if made are set out below

ST HELENS LAW LIMITED, ENTERPRISE CENTRE, SALISBURY STREET, OFF CHALON WAY, WA10 1FY

PART A – YOU AND YOUR FAMILY

1. YOUR DETAILS

Forenames	
Surname	
Address	
Post Code	
Telephone	
Date of Birth	
Occupation	
Are you (or any member of your family) known by any other names and you own any assets in a different name? If so, please give full details below:-	

2. YOUR HUSBAND/WIFE/PARTNER

Forenames	
Surname	
Date of Birth	
Occupation	

3. MARRIAGE/PARTNERSHIP DETAILS

Year of marriage	
Please tick this box if you are not married to your partner	<input type="checkbox"/>
please tick this box if you are intending to marry/re-marry in the near future	<input type="checkbox"/>
Has either of you been married before	Yes <input type="checkbox"/> No <input type="checkbox"/>

4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP)

– full names, dates of birth and address if different from yours

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

5. CHILDREN OF YOUR HUSBAND WIFE PARTNER'S PREVIOUS MARRIAGES OR RELATIONSHIPS

– full names, dates of birth and address if different from yours

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

Name	
Date of Birth	
Address	

PLEASE NOTE:

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children
- Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate

PART B – YOUR HOME AND OTHER ASSETS

6. YOUR HOME – is your home....

a) Owned:	Yes <input type="checkbox"/> No <input type="checkbox"/>
i) in your name alone?	Yes <input type="checkbox"/> No <input type="checkbox"/>
ii) in joint names with your husband/ wife/partner?	Yes <input type="checkbox"/> No <input type="checkbox"/>
iii) in the name of your husband/wife/ partner alone?	Yes <input type="checkbox"/> No <input type="checkbox"/>
b) Rented?	Yes <input type="checkbox"/> No <input type="checkbox"/>
c) Other - eg. provided by a relative	Yes <input type="checkbox"/> No <input type="checkbox"/>

7. If your answer to question 6(c) was "yes" please give details

8. Do you have a business? Yes ☐ No ☐

If yes – state the type of business

Is it a (please tick box)

Company ☐ Partnership ☐ In your sole name ☐

9. YOUR MAIN ASSETS

Please list your other main assets and give approximate values

10. JOINT ASSETS

Do you have any jointly owned assets? If yes, please give a general description and their approximate values, and the names(s) of the other owner(s)

PLEASE NOTE:

- Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will

11. DO YOU OWN ASSETS ABROAD?

If yes, please give details:

PART C – FUNERAL, EXECUTORS, GUARDIANS

12. FUNERAL

You may specify in your Will if you wish to be:

Buried ☐ Cremated ☐ Other ☐

PLEASE NOTE:

- You should make these wishes known to your immediate family as well and not rely on what is in your Will
- If you wish to leave any part of your body for medical purposes, tell your family and your doctor and carry a donor card

13. EXECUTORS

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/ partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend. List below up to four chosen executors

Name	
Address	

Name	
Address	

Name	
Address	

Name	
Address	

Would you like partners of our firm to act as your executors?

Yes ☐ No ☐

14. GUARDIANS

You may wish to appoint one or two people to act as guardians for children under 18. The appointment will usually only apply if you and the child’s other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

Name	
Address	

Name	
Address	

PART D – BENEFICIARIES

The main part of your estate is called “the residue” (This is dealt with at question 17) . Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as “beneficiaries”

15. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18

Name	
Address	
Amount	

Name	
Address	
Amount	

Name	
Address	
Amount	

Name	
Address	
Amount	

16. GIFTS OF ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or the cash equivalent

Name	
Address	
Article	

Name	
Address	
Article	

Name	
Address	
Article	

Name	
Address	
Article	

17. THE RESIDUE

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parents share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box, if not, please go to question 18

- (a) Everything to my husband/wife/partner named in question 2 above, outright, but if he/she has died then to my children, named in question 4 above, equally

Please tick to select ☐

- (b) Everything to my children, named at question 4 above, equally and any other children of mine. You may choose the age at which your children will receive their entitlement.

Insert choice from 18, 21 or 25 years in this box

- (c) To my husband/wife/partner named in question 2 above, but if he/she dies before me to the person(s) organisations(s) named in the box below. If not in equal shares then show the share such is to take

18. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

Name	
Address	
Share	

Name	
Address	
Share	

Who is to benefit if the recipient dies before you?

Name	
Address	
Share	

Name	
Address	
Share	

GENERAL NOTES

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account
2. On divorce gifts to your husband/wife are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will
3. If you are not making any provision for a husband/wife partner or a former husband wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us
4. Please feel free to ask for our help or advice or more information on the topic related to your Will during your appointment.

**Email your completed form to
onlinewills@sthelenslaw.co.uk**

Once your completed Will questionnaire is received, the form will be submitted to our Wills Department. If any further information or clarification is required, we will contact you. We will then draft your Will and forward it to you for approval whereupon it will be engrossed ready for signature