

Matthew Arnold & Baldwin <sup>LLP</sup>

## Wills Questionnaire



Taking care of what follows

Giving you a lot **more than just law...**

## Wills Questionnaire

### Introduction...

Please note that this service is designed for straightforward Wills where you do not require Inheritance Tax advice.

Simply fill out the form below: either print out the completed form and fax or post it back to our Wills team at our Watford office (please refer to the last page of this form for the fax and address details) or save the completed form to your computer and email it back to us at [questionnaire@mablaw.co.uk](mailto:questionnaire@mablaw.co.uk)

1) Are you an existing client?

Yes  No

2) If no, where did you hear about us?

### 3) Personal information

Title

Mr  Mrs  Ms  Miss  Dr

Forename(s) in full

Surname

Alias

Address

Postcode

### 4) Telephone

Home

Work

Mobile

### 5) Email address

### 6) Date of birth

### 7) Occupation

8) Is this form being filled out on your behalf?  
(If no, go to question 9)

Yes  No

Are you blind or physically infirm?

Yes  No

Who is this form being filled out by?

## Wills Questionnaire

### 9) Your relationship status

Are you

Married?

Yes  No

In a Civil Partnership?

Yes  No

Single?

Yes  No

Co-habiting?

Yes  No

Divorced?

Yes  No

Engaged?

Yes  No

Widowed?

Yes  No

Your spouse/partner's full name

Is this Will to be made in expectation of Marriage?

Yes  No

Is this Will to be made in expectation of a Civil Partnership?

Yes  No

Will your spouse/partner require a mirror image Will?

Yes  No

### 10) Residency

Are you UK domiciled?

Yes  No

Is the Will to cover worldwide property?

Yes  No

Please note that a UK Will may not be effective to cover non-UK assets. Please telephone us for further advice.

Is the Will to cover UK property only?

Yes  No

Do you have a Will in another country to cover foreign property?

Yes  No

If yes, which country?

### 11) Children

If you have young children we would not normally name them individually in the Will to allow for further children that may be born.

Child 1 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child  Stepchild

# Wills Questionnaire

Child 2 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child       Stepchild

Child 3 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child       Stepchild

Child 4 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child       Stepchild

Child 5 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child       Stepchild

# Wills Questionnaire

Child 6 – Full name

Address (if different from that given in (3) above)

Age

Relationship to you

Own child

Stepchild

## 12) Grandchildren

Grandchild 1 – Full name

Address

Age

Grandchild 2 – Full name

Address

Age

Grandchild 3 – Full name

Address

Age

# Wills Questionnaire

Grandchild 4 – Full name

Address

Age

Grandchild 5 – Full name

Address

Age

Grandchild 6 – Full name

Address

Age

### 13) Cremation/Burial

Do you wish to be:

Cremated    Buried    No preference

### 14a) Executors

In the first instance do you wish your spouse to act as your Executor?

Yes    No

Married couples usually appoint their spouse as their first choice.

## Wills Questionnaire

### 14b) Alternative Executors

Executors carry out the Administration of your Estate. At least two alternative Executors should be appointed with a maximum of four. Your Executors may also act as Trustees if, for example, you have gifted funds to minor children. Your Executors may also be Beneficiaries. An Executor must be over 18 years of age. Principals of our firm can act as an Executor either alone or with another person.

Executor 1 – Title and full name

Full address and postcode

Relationship to you

Executor 2 – Title and full name

Full address and postcode

Relationship to you

Executor 3 – Title and full name

Full address and postcode

Relationship to you

Executor 4 – Title and full name

Full address and postcode

Relationship to you

## Wills Questionnaire

### 15) Guardians

You may wish to appoint a Guardian(s) for minor children on the death of parents or if you are single. Guardians should be acceptable to yourself and, if appropriate, to your children. They will be responsible for a minor's education, maintenance and well being until the minor attains the age of 18 years. An appointment of a Guardian cannot override a former spouse's natural guardianship unless the Guardian has parental responsibility or a residence order.

Guardian 1 – Title and full name

Full address and postcode

Relationship to you (e.g. brother, sister, friend)

Guardian 2 – Title and full name

Full address and postcode

Relationship to you (e.g. brother, sister, friend)

### 16) Legacies and Bequests – Specific Legacies i.e. non-cash

Warning – assets in joint names may pass by Survivorship and not by your Will.

If you do not provide adequately for financial dependents they may be able to make a claim against your estate. Please ensure the gift is described so it can be recognised at a later date. Please use the blank page at the end of the questionnaire if you require more space.

Beneficiary 1 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

# Wills Questionnaire

Details of gift

Beneficiary 2 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

Details of gift

Beneficiary 3 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

Details of gift

# Wills Questionnaire

Beneficiary 4 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

Details of gift

Beneficiary 5 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

Details of gift

Beneficiary 6 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

## Wills Questionnaire

Title and full name

Full address and postcode

Relationship to you

Details of gift

### 17) Legacies and Bequests – Cash Legacies

Warning – assets in joint names may pass by Survivorship and not by your Will.

Beneficiary 1 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

Title and full name

Full address and postcode

Relationship to you

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18  21  25  No preference

If you tick no preference and the gift is to a minor, that gift will be held in trust until the minor attains 18 years of age, unless directed to the contrary we shall draft the legacy so that interest accrues on it from your death until the specified age.

Beneficiary 2 – Does this gift take effect before or after your spouse/partner dies?

Before  After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of  Subject to

# Wills Questionnaire

Title and full name

Full address and postcode

Relationship to you

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18     21     25     No preference

Beneficiary 3 – Does this gift take effect before or after your spouse/partner dies?

Before     After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of     Subject to

Title and full name

Full address and postcode

Relationship to you

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18     21     25     No preference

Beneficiary 4 – Does this gift take effect before or after your spouse/partner dies?

Before     After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of     Subject to

Title and full name

Full address and postcode

Relationship to you

## Wills Questionnaire

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18     21     25     No preference

Beneficiary 5 – Does this gift take effect before or after your spouse/partner dies?

Before     After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of     Subject to

Title and full name

Full address and postcode

Relationship to you

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18     21     25     No preference

Beneficiary 6 – Does this gift take effect before or after your spouse/partner dies?

Before     After

Is this gift to be free of, or subject to, Inheritance Tax?

Free of     Subject to

Title and full name

Full address and postcode

Relationship to you

Amount of gift

If beneficiary is under 18, at what age should he/she inherit?

18     21     25     No preference

### 18) Legacies and Bequests – Residue of your Estate i.e. the balance of your Estate after specific and cash legacies

Is spouse to receive residue?

Yes     No

Are children to receive residue after death of spouse?

Yes     No

## Wills Questionnaire

Age at which to inherit if under 18 at date of signing Will

18     21     25

If a child dies do their children inherit their share?

Yes     No

Age at which such grandchildren are to inherit

18     21     25

### 19) Alternative Beneficiaries

If you have a young family you may wish to add alternative beneficiaries in the event of a disaster and all the above beneficiaries failing to survive you.

Beneficiary 1 – Title and full name

Full address and postcode

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will

18     21     25

Beneficiary 2 – Title and full name

Full address and postcode

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will

18     21     25

Beneficiary 3 – Title and full name

Full address and postcode

# Wills Questionnaire

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will  18  21  25

Beneficiary 4 – Title and full name

Full address and postcode

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will  18  21  25

Beneficiary 5 – Title and full name

Full address and postcode

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will  18  21  25

Beneficiary 6 – Title and full name

Full address and postcode

Relationship to you

What percentage of your Estate are they to receive?

Age at which to inherit if beneficiary under 18 at date of signing Will  18  21  25

# Wills Questionnaire

Please use this page for any additional information or enquiries.

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## Wills Questionnaire

### The Tax, Trust & Wills Department team...

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### About us...

Matthew Arnold & Baldwin LLP are one of the leading commercial law firms in London and the South East with a network of offices along the M1 corridor. We have built our reputation on developing strong and successful business partnerships with clients, where trust, understanding and confidence are crucial to providing and taking advice. Central to our belief is providing you with the personal touch and the benefit of specifically tailored solutions to meet your exact needs.

For more information on our services and how we can help you please visit us at: [www.mablaw.co.uk](http://www.mablaw.co.uk)

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