

## WILL INSTRUCTIONS/QUESTIONNAIRE

In order that we may prepare a will which suits your circumstances, we should be grateful if you could complete as far as possible the following questionnaire. Please continue on a separate sheet if necessary, indicating the section to which the information relates. Copies of existing wills and other relevant documents should be provided, if possible.

### 1. You (and your partner)

	You	Spouse / Civil Partner / Partner (please indicate which)
Full Name		
Address		
Postcode		
Home Tel		
Mobile Tel		
Email		
Occupation		
Date of birth		
Location of previous will		
Marital status	Single/Divorced/Engaged Remarried/Married/Widowed Separated	Single/Divorced/Engaged Remarried/Married/Widowed Separated

## 2. Children

Full name	Address	Date of birth	Status*

\*In the status column please indicate:

- (a) whether the child is from the present relationship or a previous relationship;
- (b) in the case of a couple completing this questionnaire, who is the parent;

## 3. Grandchildren

Full name	Address	Date of birth	Name of parent

4. Executors & Trustees (Administrators of your Will)

Full name	Address

5. Guardians: (If children are under 18)

Full name	Address



8. Residue – After payment of Expenses, Taxes and Gifts

Beneficiary	Percentage
Column must total 1, or 100%:	

Other Details

9. Assets

Insert the values of the following, broken down by ownership.

Asset	Self (£)	Spouse/Civil Partner/Partner (£)	Joint (£)	Totals
Main residence				
Any Other Property				
Mortgages or Debts				
Bank Accounts / Savings				
Life Policies / Pensions				
Overseas Assets				
Other				
Totals				