

WILL QUESTIONNAIRE

Full name:	
Address:	
Burial or cremation:	
Full name of spouse	
Names and ages of children of present marriage:	(a):
	(b):
	(c):
	(d):
Have you or your spouse been married before?	
If answer to 6 is yes, name and ages of children of previous marriage of yourself and your spouse:	<i>Self</i> (a):
	(b):
	(c):
	<i>Spouse</i> (a):
	(b):
	(c):
Names and addresses of proposed executors:	<i>First executor</i> Full name: Address: Postcode:
	<i>Second executor</i> Full name: Address: Postcode:

Name and address of guardians (only relevant if there are infant children):	<i>First guardian</i> Full name: Address: Postcode:
	<i>Second guardian</i> Full name: Address: Postcode:
10 Pecuniary legacies, amount, full name and address of legatee:	(a):
	(b):
	(c):
	(d):
11 Specific legacies of property, full name and address of legatee:	(a):
	(b):
	(c):
	(d):
Beneficiaries of the rest of the estate (residue):	
Substitute beneficiaries of residue:	
At what age do you wish children to inherit residue?	
Who will receive residue should both your spouse and children die before you?	

INHERITANCE TAX MITIGATION

Complete the following schedules to help your solicitor assess the inheritance tax position:

ASSETS

	You	Your spouse	Tick if owned jointly
House			
Contents			
Car			
Jewellery			
Cash at bank			
Cash at building society			
Quoted stocks and shares			
Partnership share or value of a sole business			
PEPs and ISAs			
Unlisted stocks and shares (eg in a private company)			
Other Assets, including non-UK (please specify)			

LIABILITIES

	You	Your spouse	Tick if owned jointly
Mortgage			
Other			

LIFE ASSURANCE POLICIES

	You	Your spouse
Policy number		
Sum assured		
Life insurance company		
Premiums		
Purpose of policy		
Whether or not in trust		

PENSION DEATH BENEFITS

	You	Your spouse
Pension scheme or policy		
Amount of death benefit		
Widow's or widower's pension		
Is death benefit in trust?		
Nomination form completed		

Have you or your spouse made any substantial gifts in the last 7 years?