

Will Instruction Questionnaire

1. Personal details		
	Self	Spouse/Partner
Title		
First name(s)		
Surname		
Home address		
Home telephone		
Work telephone		
Mobile		
Fax		
Email		
Date of birth		
Are you in good health?		
Do you have any financial dependants?	(if yes, please enter details below)	(if yes, please enter details below)
Dependants full name(s)	Date of birth	Relationship

2.1.1. Your home and any mortgage and other loans or liabilities		
Your home and mortgage	Self	Spouse/Partner
Ownership of your house		
Do you have a mortgage?		
	Approx outstanding balance £	Approx outstanding balance £
Mortgage type		
Covered by Life Assurance?		
Current value of the property		
Second property value		

2.1.2. Your investments of you/your spouse or civil partner

Type of investment	Description	Value (£) of whole	Value of your share (1/2; 1/3 etc)	Name(s) held
Deposits (Bank, Cash ISAs, Building Societies)				
Stocks and shares Privatisations, shares, Gilts and Bonds				
Other Property, Land, Art, etc				

2.1.3. Your life assurances

Please provide details of death benefits including employer death in service benefits if known; if none, please go straight to Section 2.1.4

Life Office and policy number	Policy Holder	Life assured (if different from the Policy Holder)	Sum assured	Maturity date	In trust

2.1.4. Your pension arrangements

	Self	Spouse/Partner
Anticipated retirement date?		
Are you a member of a Company or Personal pension scheme?		
Level of Death in Service benefit if known.		
What provision, if any, for your Spouse/ Partner?		

3. Will instructions

Please provide full details below

i) Are you married/ single/ co-habiting?	
ii) Are you divorced or have you had a civil partnership dissolved?	
iv) Are you a widow(er)?	
v) Do you have children still living?	

3.1. Children's details

Name	Address	Postcode	Date of birth
i) Is any child from a previous relationship?			
ii) Is any child adopted?			
iii) Is any child a step-child?			
iv) Is any child subject to a residency order?			
v) Is any child in the care of another person who may or may not have a residency order?			
vi) Is any child's natural parent living (other than detailed above)?			

3.2. Guardians – for children under 18 years

Your Guardians will be responsible for making legal decisions for your children. If you have no children under 18, please go straight to Section 3.3. *Please specify one or two and their relationship to you (if any).*
For reasons, which will be explained, try and ensure you do not appoint the same people as both Guardians and Executors (see next page).

Name	Address	Postcode	Occupation	Relationship

3.3. Executors

Your Executors will be responsible for collecting and securing your assets, paying your debts, funeral expenses and any tax and for distributing your estate in accordance with the terms of your Will.
A husband and wife/civil partners will usually appoint each other and at least one other person, and on death of the survivor of them appoint two other persons. Your children who are adults may act. You will need to have a minimum of two Executors if there are minor beneficiaries.

Executors name	Address	Occupation	Relationship

3.4. Domicile / Residency – General notes

- UK residents are liable to UK Income Tax on UK and foreign income.
- Non-UK residents are subject to Income Tax only on the income arising in the UK and not that abroad.
- If you are resident in the UK but not domiciled in the UK then you pay tax on foreign income only so far as it is brought into the UK.
- Residency and Ordinary Residence – the requirements laid down by the Revenue to determine whether or not you fall into either definition are complex and regrettably beyond the scope of this note.
- Domicile – is where you have your permanent home (i.e. initially your place of birth). Your domicile may affect taxes payable in the event of your death.

i) Where are you resident for Income Tax purposes?

ii) Where is your country of domicile?

iii) To where do you intend to retire?

iv) Is foreign property to be covered by this Will?

If yes, please give details below:-

Please note – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we will be pleased to provide such advice for an additional fee or (after discussing it with you) we will direct you to alternative specialist advice.

3.5. Do any of the following affect you?

i) Is your Estate worth more than £325,000

Please note – if your estate, when added to any gifts made in your lifetime exceeds £325,000 – or if the estates of you and your spouse or Civil Partner together exceed £650,000 – it may be that Inheritance Tax will be payable on your death. We will not, however, offer more detailed advice in relation to Inheritance Tax Planning unless you ask us to do so; in those circumstances we reserve the right to charge an additional fee which we will be pleased to discuss with you beforehand.

ii) Are any beneficiaries mentally impaired?

If yes to the above, please state their name(s) and age(s)

iii) If you are divorced / separated / previous Civil Partnership, have your financial affairs been sorted out?

iv) If you have children from a previous relationship are you keen to protect their interests?

v) Do you have any other dependents? e.g. children of your spouse, former spouse, civil partner, former civil partner, co-

habitee, elderly relatives	If yes, please provide details in the box below
vi) Are there any dependents you do not intend to provide for in this Will.	If yes, please provide details including the reason you are not including them:
<p>Please note – The Inheritance (Provision for Family and Dependents) Act 1975 may enable certain persons to seek additional provision out of your estate after your death irrespective of the terms of your Will if, in the opinion of the Court, your Will fails to make reasonable provision for them. If an application is made under this Act it is likely to involve your estate in expense and may result in a variation of the dispositions made in your Will. If the information which you provide to us for the purposes of preparing your Will suggests that there is a real risk of such an application being made in respect of your estate, we will advise you that this is the case. We will not, however, offer more detailed advice in relation to the 1975 Act unless you ask us to do so and, in those circumstances, we reserve the right to charge an additional fee but, as before, we will be pleased to provide you with an estimate of the likely costs on request and seek your approval before going ahead.</p>	
vii) Do you have cremation / burial wishes?	If yes, please provide details in the box below
viii) Do you want the cost of any memorial to be paid for out of your estate?	

3.6. Where do you want your Estate to go?		
<p>i) Specific gifts e.g. jewellery, property, shares Please ensure you provide full and accurate descriptions. If there is confusion on your death, the gift may fail for uncertainty. A Beneficiary is the person you would like to receive the gift.</p>		
Item	Full name and age at which they are to Inherit	Address
	Name: Age: Is the gift to be free of /subject to tax / mortgage?	
	Name: Age: Is the gift to be free of /subject to tax / mortgage?	

Do you want all of these gifts to occur on your death, or after the death of your spouse/partner (if later)?		
ii) Legacies – i.e. a sum of money		
Amount	Full name and age at which they are to Inherit	Address
	Name: Age: Is the gift to be free of /subject to tax?	
	Name: Age: Is the gift to be free of /subject to tax?	
	Name: Age: Is the gift to be free of /subject to tax?	
	Name: Age: Is the gift to be free of /subject to tax?	
iii) Remainder of your Estate		
This is everything that is left after the payment of your debts etc and of the specific gifts and legacies given above.		
Do you want the remainder of your estate to go to your spouse / partner / civil partner / co-habitee?		
If not, where do you want it to go (your children / other relatives / friends)? (Please provide details in the comments box)		
If those specified above predecease you, where do you want it to go? (Please provide details in the comments box)		
Other arrangements (Please provide details in the comments box)		

If none of the above survive you, where do you want it to go?
e.g. other family members or charities?
(Please provide details in the comments box)

4. Comments / Further information

Please use this section to expand on any information you have given or for any specific requirements you may have. Please provide the Section number and question it relates to.

The information requested in this form is entirely confidential. It is both personal and financial information that is essential in assisting us to offer you advice. Periodically, we may have to confirm that the information is current.

Declaration

This information has been provided on the understanding that it will be used in strict confidence and that it places me/us under no obligation to take up any recommendations.

I/we have provided all the details we wish to disclose to you in seeking advice. I/we will not hold you responsible for any advice given that may be materially different by not fully disclosing all my/our personal and financial information to you.

I/we confirm that I/we have read, understand and agree to the Hatch Brenner LLP standard terms and conditions ([please click to view](#)), and I/we approve the use of information in this form for the purposes of carrying out the required money laundering search against my/our name(s).

Signature of Self: _____ **Date:** _____

Signature of Spouse/Partner: _____ **Date:** _____