

Lasting powers of attorney questionnaire

Though none of us like to think about losing the ability to manage our own affairs, it can happen. It is important to put arrangements in place so that others can make decisions for us should the need arise. You do that through a lasting power of attorney (commonly referred to as an LPA).

Before we meet to discuss making an LPA, it would be useful if you could complete this form for us to consider ahead of the appointment. Please save this document to your computer before you begin working on it, and once complete, email a copy to us.

We will review your questionnaire within 2 working days of receipt and one of the team will get in touch with you to arrange an appointment if you do not have one in place already. You should allow approximately 1.5 hours for the appointment.

Are you completing this form for yourself or on behalf of someone else?

For myself For someone else

If you are completing this on behalf of someone else can you please tell us why.

About you

Title _____

Full name _____

Date of birth _____

Address _____

Postcode _____

Telephone No. _____ Mobile No. _____

Email address _____

Have you made an appointment with us already?

Yes No

If no, what is the preferred way you'd like us to contact you to make an appointment:

Phone Email Either way

About your appointment

I wish to appoint attorneys to make decisions about my:

(please tick all that apply)

Property & financial affairs

Health and welfare

Business assets

The three LPAs are completely separate: you can choose to make one or more, depending on your circumstances and needs. For more information about the different types of LPAs please read our LPA guide or we can discuss these options when we meet.

Have you made a will within the last 5 years?

Yes No

Is there anything else you'd like us to know ahead of your appointment with us?

Thank you for completing this questionnaire which provides us with a little information about how our wills, trusts & probate team can help.

We will need some further information when we meet. We will provide you with details of this when we contact you to confirm the appointment.

If you would like to know how we handle your personal data please read our privacy policy on our website, or ask the team for a copy.

Contact

Please contact the lead partner in our wills, trusts & probate team:

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