

Will questionnaire

Before we meet to discuss your will, 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 hour 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 assets

- House & other UK property
- Foreign property
- Personal belongings (eg cars, furniture, jewellery, watches)
- Digital assets (eg online accounts, photos, music, websites)
- Savings
- Shares/investments/bonds
- Business assets
- Insurance policies
- Mortgage/loans/credit cards & other debts

Your assets

£
£
£
£
£
£
£
£
£
£

Your spouse/partner's assets

£
£
£
£
£
£
£
£
£
£

About your family

Your spouse/partner's name _____

Do they wish to make a will at the same time?

Yes No

Have you been married or in a civil partnership before?

Yes No

If appropriate, please give your children's names

Would you like to make a lasting power of attorney?

Yes No

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).

Is there is 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 your 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.

NOTES AND GENERAL INFORMATION

- A will is usually completely cancelled if you marry or enter into a civil partnership after making it. You will need to make another will immediately, or one that takes a forthcoming marriage or civil partnership into account.
- On divorce or dissolution of a civil partnership, gifts to your husband/wife/civil partner are cancelled, as is his/her appointment as executor, but the rest of the will stands. This can create problems and it is better to make a new will.
- If you are not making any provision for a husband/wife/partner or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this situation may apply, please ask us for further advice.
- Please ask for help or more information on any topic related to your will during your appointment.