

Will Information Questionnaire and Instructions

1) Full Names :

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.....

Are you known by any other name? If so give full details

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Give details of any assets held in the alternative name

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2) Your current address including postcode :

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.....
.....

Correspondence address if different

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.....
.....

Email address

3) Telephone Number Home:

Mobile:

4) Marital Status: Single/Widow(er)/Married/Divorced/Co-Habitee

5) Personal Details

You	Your Partner
Date of Birth:	Date of Birth:
Place of Birth:	Place of Birth:
Occupation:	Occupation:
Maiden Name:	Maiden Name:

6) Names of children (including your children from any previous marriage or relationship). Full names, dates of birth, and address if different from yours.

7) Do you already have a Will? YES/NO

Where lodged :

8) Do you have any assets abroad? YES/NO

- a) What?
- b) Where?

9) Do you have any wishes about your funeral arrangements?:

Buried Cremated Other

10) Who do you wish to appoint as your Executors to carry out the instructions in your Will?

It is wise to have at least two and you may appoint your husband/wife/partner or any other intended Beneficiary. You may name other executors to act if he/she is unable to do so. TrentSide Legal., will be pleased to act as your executors, either alone or with a member of your family or your friend.

Name and Address 1:	Name and Address 2:
.....

.....
.....
.....
.....

11) Is it likely that Inheritance Tax will be paid on your estate?

YES/NO

12) Financial Dependents?

Do you have any of the following for whom it is intended to make no provision in the Will:

- a) Spouse: YES/NO
- b) Former spouse who is not remarried: YES/NO
- c) A person (other than a former spouse) who lived with a client within two years. YES/NO
- d) A child YES/NO
- e) A child of the family treated as such by the client In relation to his/her marriage YES/NO
- f) Any other person who is currently maintained wholly or partly by the client YES/NO

13) Do you own any property? If so please give the following details::

(a) Property Address:

.....
.....

Any mortgage? With whom and how much is outstanding?

.....

Title Deeds where held?

Is the property in your sole name or in the joint names of you and another?

Extra space if required.

- 14) List details of all gifts of particular items which you wish to make (specific gifts)

Gift (item)	Beneficiary (to whom)
.....
.....
.....
.....
.....

- 15) List details of any gifts of money you wish to make to include any charitable gifts (pecuniary legacies)

Legacy (Amount)	Beneficiary
£.....
£.....
£.....
£.....
£.....

- 16) Who do you wish to benefit from the remainder of your estate (Residuary Estate):

.....

- 17) Have you made or do you intend to make any gifts which should or should not be taken into account from your residuary estate?

If you have or you intend to do you wish that beneficiary to pay IHT on the gift or should it be borne by the estate?

- 18) Do you have Lasting Power of Attorney? YES/NO

If not do you require any information? YES/NO

19) Is your Will urgent?

YES/NO

If so please telephone Helen Kirk immediately to discuss arrangements for preparing your Will and arranging for you to sign it.

Signed:

Dated:

PLEASE RETURN THIS FORM TO US BY FAX, EMAIL OR POST AND WE WILL BE IN TOUCH WITH YOU.

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