

WILL QUESTIONNAIRE

This questionnaire will provide us with some of the information required to draft a Will for an individual, or two mirror Wills for a couple. We will discuss this with you in detail at your interview. Please complete as much as possible and return in advance of our meeting.

If you have an existing Will, please provide a copy. If you have a foreign Will, please provide a copy.

Please also provide copies of two types of ID (one photo ID and one address ID) for each person requiring a Will.

Personal details		
	You	Your spouse/partner
Full names including title:		
Any other names used: (e.g. maiden name/alternative spelling)		
Postal address:		
Email address:		
Occupation:		
Phone numbers:	H: M:	H: M:
Date of birth:		
Place of birth:		
Nationality:		
Have you previously been widowed? If yes, please confirm date	YES/NO	YES/NO

Are you married / in a civil partnership OR intending to marry or enter into a civil partnership in the near future? Please provide details	YES/NO
Do you require mirror Wills?	Yes/No
Children & Grandchildren (including those of any spouse/partner/civil partner)	
Please list all your children and grandchildren (if any) and identify clearly whether they are children of your current marriage or by any previous marriage or relationship, or if they are grandchildren, who their parents are. If you do not have children, I would normally make provision for any that you may have in the future, unless you advise us that this is not appropriate. Please also include full details of any child(ren) that you do not intend to benefit in your Will.	
Full names and dates of birth of children and confirmation of their relationship to you/your spouse/partner/civil partner:	Addresses (if different from your own)
Children	

Grandchildren	
Dependants (including those of any spouse/partner/civil partner)	
The law enables certain categories of potential claimants to apply to the Court for reasonable financial provision from a deceased person's estate. The position should be evaluated when making a Will.	
Please give details of any persons in the categories listed below:	
A spouse/civil partner of you or your partner from whom you or your partner are separated or in the process of divorcing:	
A former spouse/civil partner of you or your partner who has not remarried:	
Any person being wholly or partially maintained by you (or your partner). There is no need to mention children whose details have been set out in the previous section:	

Assets and liabilities			
Please indicate below as far as you can the present approximate value of assets held and outstanding liabilities by reference to the names in which they are held. If you are not sure of the amounts, please give estimates. If you are unsure as to any of the headings just leave them blank and I will discuss them with you. Please include online accounts and any digital assets.			
Assets	Your name	Your partner's name	Joint names
Freehold property	£	£	£
And the Mortgage on property (if any)	£	£	£
Leasehold property	£	£	£
And the Mortgage on property (if any)	£	£	£
Household and personal effects (including jewellery and cars)	£	£	£
Cash at banks and building societies	£	£	£
National Savings products	£	£	£
Quoted shares including ISAs	£	£	£
Life assurance	£	£	£
Pension plans (show lump sum death benefits)	£	£	£
Business property (sole trader)*	£	£	£
Partnership property*	£	£	£
Unquoted stocks and shares*	£	£	£
Lloyd's underwriting assets*	£	£	£
Agricultural property*	£	£	£
Woodlands*	£	£	£
Foreign assets*	£	£	£
Interests under settlements*	£	£	£
Loans repayable to you	£	£	£
Other	£	£	£
Totals	£	£	£

*NOTE: Where your estate includes assets marked with an asterisk we normally recommend we provide further advice.

Have you made any gifts of over £3,000 in the last 7 years? If yes, please provide details.

Funeral wishes You may wish to state in your Will how you want to dispose of your body, e.g. cremation or burial. Any more detailed wishes would usually be set out in a private side letter.		
You	Your spouse/partner	
Executors Your executors will be responsible for collecting the assets of your estate, paying debts, funeral expenses and taxes and distributing the balance in accordance with your instructions. Your spouse or partner may be an executor. Most people then choose other family members or friends. Some professionals are also willing to act as executors and may be named as first-choice executors or as substitutes. Directors of Isla Law may be willing to do so in some circumstances. I will need your executors' full names and addresses. If you have young children, or are leaving your estate on any kind of trust, you will need more than one executor. You can have a maximum of four.		
	You	Your spouse/partner
Executor 1 name and address		
Executor 2 name and address		
Substitute only? Y/N		
Executor 3 name and address		
Substitute only? Y/N		
Executor 4 name and address		
Substitute only? Y/N		
Guardians If you have a child or children under 18, it is important to appoint a guardian or guardians to look after them in case you and the other parent should die while they are still under age. Please give this some thought, if appropriate, and I will need their full names and addresses.		
	Guardian 1	Guardian 2
Full names:		
Address:		
Relationship to you (if any):		

Gifts of cash or specific personal belongings		
Before deciding to whom the main part of your estate should be left, you may consider making gifts of cash or your specific personal belongings. Please write below the full names and addresses of the recipients and state the amount of money or describe clearly the items you wish each of them to receive.		
Beneficiary's full names and address:	Relationship to you:	Amount or description of item:
In case of Wills for couples, please tick one box only to indicate whether any cash legacies are to be paid under each Will, or once only on the first or second death. I generally advise they take effect on the second death in the case of spouses as this is more tax efficient.		
Legacies under each Will (i.e. they will be paid twice)	☐	
Legacies only on first death	☐	
Legacies only on second death (recommended for married couples/civil partners).	☐	

Gift of property	
If you wish to make a specific gift of property in your Will or leave someone an interest in property, for example allowing an individual to live in your property for the rest of their life, I will need to obtain a copy of the Title for the property from the Land Registry at a cost of £7+VAT.	
Do you wish to make a specific (outright) gift of property separately to the rest of your estate? Yes/No	Address of property: Name and address of beneficiary:
Do you wish to leave someone a right to continue living in your property (life tenant), while the beneficial interest is held for someone else (remainderman)? This creates a trust known as a Life Interest Trust. Yes/No	Address of property: Name and address of life tenant: Name(s) and address(es) of remaindermen:
I will also need to know: • Do you intend that gift to apply to any adjoining land? • Is there a mortgage on the property? • Should there be any conditions attached? E.g. The right to live in the property will end on remarriage. • Is the gift specific to this property or should it be more flexible and allow that individual to move and have the same arrangement over a new property? • If you give an individual a life interest, will they be able to afford to live in the property and pay the outgoings and insurance? Consider leaving them a cash gift in addition to the interest in property. Consider who would be the trustees. Professionals, including the directors of Isla Law, would need to charge fees for acting as trustees, so consider if you are happy for this to happen or would prefer other individuals of your choosing to act instead. We will only act on the condition that a clause is included providing that we can charge fees in the future for taking on this role. Your executors can also act as your trustees.	

Residuary Estate	
Please indicate how you wish to leave the remainder of your estate in the space below. (Please note, for inheritance tax reasons, it is more tax efficient if the residuary estate is left to your spouse or civil partner if they survive you.)	
Estate to spouse/CP?	Yes/No
If your spouse should predecease you or you do not have a spouse/CP/partner, to whom should your estate be left?	
If you have young children, consider a long-stop provision in the event that you should all die together.	
Signatures	
Signed:	Date:
Signed (spouse/partner):	Date:
Where did you hear about Isla Law?	
Do you have Enduring Powers of Attorney or Lasting Powers of Attorney? These are very important and would enable someone to act on your behalf should you no longer be able to act for yourself – would you like more information?	
Do you have an accountant? If not, would you like us to put you in touch with someone suitable?	
Do you have an Independent Financial Adviser? If not, would you like us to put you in touch with someone suitable?	

Please send your completed questionnaire by post or email to the addresses below, and one of the team will be in touch to book an appointment as soon as possible.

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