

J. O'NEILL & Co SOLICITORS

WILL QUESTIONNAIRE

Unit 3 Forum Court - 32-34 King Street Southport PR8 NX - 01704 549 549

Full Name .....

Address.....

(Is this property owned by; you /jointly owned /rented) If jointly owned please give other owners name

Date of Birth.....

Status ie Single / married/ divorced/ widowed

Contact numbers.....

Do you wish the bulk of your estate to go to your spouse/partner and for them to be your sole executor?

Yes/No

If yes please give their full name and address.....

If no then please indicate who you wish your estate to pass to should your spouse have previously deceased you or should the above not be applicable.....

.....  
.....

Name and address of executor if not spouse.....

IDEALLY YOU SHOULD HAVE TWO EXECUTORS AND THEY SHOULD BE CLOSE FRIEND OR FAMILY MEMBER WHO YOU TRUST TO CARRY OUT YOUR WISHES, AND PREFERABLY OF A YOUNGER AGE THAN YOURSELF. (The partner of this firm will be an executor if necessary- please telephone to discuss further)

Residual beneficiaries (please insert names and addressees and any split of your residue which you think would be applicable)

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

These will be called your residual beneficiaries. If there is more than one please indicate any splits or percentages applicable:

Please provide the full names and addresses of any children and also the guardians of any children if applicable (full names, dates of birth and addresses of children and appointed guardians please)

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.....  
.....

(Please note this will be evidence of your intention but will not necessarily guarantee that intention. The court can and will decide what is best for the children and in their best interests)

Please let us know if you have any special burial, cremation or other requests.....

While you can put this in your will it is advisable that you let family members and executors know of your wishes as there is a possibility that your Will may only be found or read after your funeral.

GIFTS- MONETARY OR POSSESSIONS. Complete if applicable. These are called specific gifts and will be payable first/given out before the bulk of your estate is distributed. You therefore need to ensure that your estate can cover these items as well as leaving the bulk of that estate to your main beneficiary. Please therefore complete the following:

I also wish to make the following gift of money or possession:

NAME.	ADDRESS	ITEM	MONEY
1.....	.....	.....	.....
2.....	.....	.....	.....
3.....	.....	.....	.....

Please also include above any charitable donations you may wish to make.

The above is intended for outline purposes only and enables us to advise you more fully. We will need to discuss with you the following:

1. If you are still legally married and leaving the bulk of your estate to any new partner
2. If you have children, adopted or otherwise or that you have assumed responsibility for which are not included in the will.
3. Any individual you actively maintain or have responsibility for which is not included in the will.
4. Any business interests or foreign property
5. Whether tax advice is needed. Currently the amount of your estate on death that is not liable to inheritance tax is approx £300,000 per individual. Anything over this amount is chargeable at a rate of 40%. It is therefore essential if possible your Will can be used as a tax planning device. Please indicate whether you feel your estate exceeds this. (Your estate includes all monetary interests, values, properties, articles, business interests, stocks, shares, investments, life policies and anything which is held on your behalf in trust)

If you have any queries please contact us :-

**J.O'Neill & Co Solicitors.**

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