

WILL INSTRUCTIONS/ QUESTIONNAIRE



Clarkson Wright & Jakes
Solicitors and Notaries

In order that we may prepare a Will which suits your circumstances, we should be grateful if you would complete as far as possible the following questionnaire. Please continue on a separate sheet, if necessary, indicating the section to which the information relates. If you are a married couple making Wills together, you need to complete one questionnaire between you.

Only provide the value of your assets in section 6 if you believe you need Inheritance Tax advice.

Copies of existing Wills and other relevant documents should be provided, if possible.

Particulars of you and your family		
1. Personal Details <i>If applicable your spouses details are required on page 2</i>		
1.1	Name (full use and any informal names you use)	
1.2	Address	
1.3	Daytime telephone number	
1.4	Home telephone number	
1.5	Occupation	
1.6	Date of Birth	
1.7	Country of Residence Domicile (if different)	
1.8	Email	
1.9	Location of any previous Will	
1.10	Marital Status NB "marriage" includes civil partnership for the purposes of this questionnaire Please delete as appropriate.	Never married Cohabiting Married Separated Divorced Remarried following divorce/death of spouse Widowed

1.11	Health issues Please provide outline details of any health issues			
1.12	National Insurance Number			
2 Details of any Spouse or Partner				
2.1	Name			
2.2	Address			
2.3	Status			Spouse Partner
2.4	Date of Birth			
3 Details of any Children		On a separate sheet please give details of any health or other issues which might make any child vulnerable		
Full Name		Address	Date of Birth	Status
				Natural Adopted Step Child Illegitimate
				Natural Adopted Step Child Illegitimate
				Natural Adopted Step Child Illegitimate
4 Details of any Grandchildren		On a separate sheet please give details of any health or other issues which might make any child vulnerable		
Full Name		Address	Date of Birth	Name of Parent

5 Details of any person who is financially maintained by you					
Full name		Address		Date of birth	Nature of relationship
6	Details of Estate	Brief Details		Value of your interest	Value of Spouses'/ Partner's interest
6.1	Main residence and any outstanding mortgage secured on it and location of title documents				
6.2	Stocks and Shares				
6.3	Unit Trusts				
6.4	Bank Accounts				
6.5	Building Society Accounts				
6.6	National Savings Accounts				
6.7	Life Policies				
6.8	Business Property (please provide accounts and Articles of Incorporation)				
6.9	Agricultural Property				
6.10	Foreign Property				
6.11	Property in trusts of which you are a beneficiary and in trusts in which you have general power of appointment				
6.12	Lifetime gifts, to whom and when made				
 		 		Estimated Value of Estate	

Please refer to the leaflets “What is an executor?” and “What is a guardian?” before completing this page.

CONTENTS OF WILL				
7	Funeral/burial requirements organs for medical use			
8	Particulars of Executors and Guardians			
8.1	Executors	Name	Address	Relationship
1.				
2.				
3.				
8.2	Guardian(s)	Name	Address	Relationship
1.				
2.				

11	The rest of your estate		
	Beneficiary	Interest absolute or nature of interest	Proportion of residuary estate
11.1			
11.2			
11.3			
11.4			
12	Who wil inherit your estate if those listed in 10 above fail to survive you?		
13	Additional comments or relevant information		
14	Date of completion of this form		

Please email your completed questionnaire to jeremy.wilson@cwj.co.uk or post to:
Valiant House 12 Knoll Rise Orpington Kent BR6 0PG

I/we understand that the advice I/we receive will be based on the information on this form. Having reviewed the information pack and your pricing structure, I/we have decided to choose the following service:

Standard : I want a simple Will and understand that I will receive no advice on inheritance tax or ways to protect either assets or any vulnerable beneficiaries. I have no overseas assets or connections. I understand that you will not review any documentation concerning any business I am involved with and will not advise on the effect of my Will on my business. I have no health issues which may affect my Will.

Signed:..... Signed:..... Date:.....

Estate planning: I want advice on my Will and inheritance tax. I understand that I will receive no advice on ways to protect assets or any vulnerable beneficiaries. I have no overseas assets or connections. I understand that you will not review any documentation concerning any business I am involved with and will not advise on the effect of my Will on my business.

Signed:..... Signed:..... Date:.....

Advisory: I want advice on all aspects of my estate and the impact of my Will. I also want advice on the best way to protect the inheritance of any vulnerable beneficiary.

Signed:..... Signed:..... Date:.....