**Wills Questionnaire**

Please fill in this questionnaire. It will help us when we prepare your will.

**Personal Details:**

|  |  |
| --- | --- |
| FULL NAME(s) AND DATE(S) OF BIRTH |  |
| ADDRESS :  (inc. Postcode) |  |
| TEL. NO :  (inc. STD Code) |  |
| FULL NAME(s) OF  PARTNER/SPOUSE: |  |
| email address (if you are happy for us to email items to you) |  |

**Potential Third Party Claimants**

Under the Inheritance (Provision for Family and Dependants) Act 1975, certain categories of people have a right to receive part of your estate. These include your spouse/civil partner, a spouse or civil partner from whom you are estranged but not divorced and anyone who is dependant on you for money or for accommodation before you died. Please supply full details of anyone who might be able to make such a claim against you.

|  |  |  |  |
| --- | --- | --- | --- |
| FULL NAME |  | FULL NAME : |  |
| ADDRESS: |  | ADDRESS: |  |
| RELATIONSHIP  TO YOU: |  | RELATIONSHIP  TO YOU: |  |

Next, please list anyone who you feel might expect to receive part of your estate such as your children or someone who has put themselves out in the expectation of receiving something in your will. An example would be a friend or relative who has come to live with you in the expectation of being a beneficiary in your will.

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| --- | --- | --- | --- |
| FULL NAME : |  | FULL NAME : |  |
| ADDRESS: |  | ADDRESS: |  |
| RELATIONSHIP  TO YOU: |  | RELATIONSHIP  TO YOU: |  |

Finally, please provide details of any other close relatives you may have, whether or not they are to inherit from you.

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| --- | --- | --- | --- |
| FULL NAME : |  | FULL NAME : |  |
| ADDRESS: |  | ADDRESS: |  |
| RELATIONSHIP  TO YOU: |  | RELATIONSHIP  TO YOU: |  |

# Executors:

You will need to name at least one Executor, who will be the person able to deal with your estate in the event of your death. We do however advise that you name two Executors. Cooke Painter Limited is happy to be appointed either as a sole Executor or as co-executor with another person of your choice. We are happy to discuss this with you.

Your Partner/Spouse may be your sole Executor. However if he/she dies before you, please indicate who you would like to appoint instead.

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| --- | --- | --- | --- |
| FULL NAME : |  | FULL NAME : |  |
| ADDRESS: |  | ADDRESS: |  |
| RELATIONSHIP  TO YOU: |  | RELATIONSHIP  TO YOU: |  |

### Gifts:

### Have you made gifts of more than £3,000 per year in the last 7 years? If so, please provide full details of the amounts, dates and beneficiaries. Any gifts of £250 or less to any person in any year can be ignored – you can make as many of these each year as you like without any Inheritance Tax implications.

### Guardians:

If you have any children under the age of 18 years, who would you like to be their guardians?

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| --- | --- | --- | --- |
| FULL NAME : |  | FULL NAME : |  |
| ADDRESS: |  | ADDRESS: |  |
| RELATIONSHIP  TO YOU: |  | RELATIONSHIP  TO YOU: |  |

**Gifts:**

Do you wish to make any specific gifts? If any of the gifts are to be given to children, please could you let us know their age. You may also wish to consider the age they should receive the gift, e.g. 18, 21, 25 years. Please give full details below:

| Item | Name  (inc. age now if minor) | Address | Age To Receive | Relationship To You |
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**Residue:**

1. Who would you like to receive the remainder of your property, after debts, funeral expenses and tax? You may wish to give several people a share, in which case please let us know if they should get equal shares or what share they should receive.

If you leave everything to your Partner/Spouse, please consider what you would like to happen to his/her share should he/she die before you. Please do not base your response on the basis of you both dying together as this is extremely unlikely.

| Share | Name  (inc. age now if minor) | Address | Age To Receive | Relationship  To You |
| --- | --- | --- | --- | --- |
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1. If any of the people named above dies before you, would you like their share to go to their children, and if so at what age:

Yes / No (delete as appropriate)

18 years / 21 years / 25 years / Other (please specify).......

3. If any of the people named above die before you and they do not have children what do you want to happen to their gift/share? (e.g. Charities etc.)

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### Funeral Arrangements:

If you wish, you may have a clause giving directions for your funeral, e.g. whether or not you wish to be cremated, or provide instructions for burial. If burial is required, we will need to know the arrangements you have made. Please also say whether you carry a Donor Card and whether you consent to your organs being used for medical research.

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### Equity Release

Many people make Wills on the basis of property they own or might expect to own but may also find that they need capital or income in retirement. Please let us know if you have or would like information in connection with the release of equity on your property.

Yes / No (delete as appropriate)

### Assets

It may assist your Executors and relatives if a list of current assets is completed. Should you wish to do so, please produce a list of your assets and return it with this questionnaire. This will help us to assess any Inheritance Tax liability.

### Pets

It may come as no surprise that we receive a number of requests/concerns in connection with client’s pets - and not just cats and dogs! If there are any arrangements that you would wish to pass on or wish to express then please indicate or otherwise let us know you would like these issues discussed.

How have you come to choose Cooke Painter Limited for dealing with this case on your behalf? Are you an ***existing client***, were you ***introduced by a broker or agent***, did you ***access us via our website***, ***find us in yellow pages*** or ***find us in some other way***? (If so, please specify.)

**Please now sign and date:** ..................................................................................

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Please note that you have not made a valid will by completing this form. The form is designed to provide us with some of the information we will need to produce your will for you. Your will is only valid once it has been properly signed and witnessed.

##### WITH COMPLIMENTS