



will instruction/questionnaire

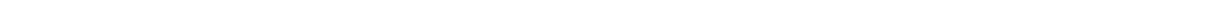
(includes lasting powers of attorney)

In order that we may prepare a Will which suits your circumstances, please complete as far as possible the following Questionnaire. Please continue on a separate sheet, if necessary, indicating the section to which the information relates. Copies of existing Wills and other relevant documents including Title Deeds should be provided, if possible.

If you would prefer to contact us for an initial discussion before completing the form, or would like to arrange a meeting to give your instructions please contact the Partner or member of staff who usually handles your affairs or Mr Charles Jones or Mrs Kate Smith who are the Partners of the Tax, Trust and Private Client Department.

particulars of you and your family

1	personal details	
1.1	name	
1.2	address	
1.3	male/female	
1.4	daytime telephone number	
1.5	home telephone number	
1.6	occupation/status	
1.7	date of birth	
1.8	country of residence	
1.9	nationality	
1.10	marital status	
2	spouse or partner' s details	
2.1	name	





2.2	male/female	
2.3	date of birth	
2.4	contact telephone number	
2.5	occupation	
2.6	country of residence	
2.7	nationality	
2.8	marital status	

3	details of any children			
	full name	address	date of birth	natural adopted step child illegitimate
4	details of any grandchildren			
	name	address	date of birth	name of parent



particulars of your property

5	details of estate		your interest	your spouse's / partner's interest
		brief details of assets/liabilities	£	£
5.1	main residence			
	other property			
5.2	mortgages and other debts			
5.3	quoted stocks and shares			
5.4	unit trusts			
5.5	bank accounts			
5.6	building society accounts			
5.7	national savings accounts			
5.8	personal chattels			
5.9	life cover			
5.10	pension arrangements			
5.11	business property/interests and shares in unquoted/family companies			

5.12	agricultural property			
5.13	foreign property			
5.14	property in trusts of which you are a beneficiary and in trusts over which you have general power of appointment			
5.15	lifetime gifts (please indicate to whom and when made)			
		estimated value of estate	£	£

instructions for new will

6	date and location of current Will (and codicils if any)	
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7	funeral/burial arrangements organs for medical use etc	
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8	particulars of guardians and executors			
		name	address	relationship
8.1	guardian(s)			
8.2	executor(s)			

If you wish to leave a gift to a guardian or executor include the details in the following sections and indicate whether the gift is conditional on acceptance of the appointment.



9 specific gifts				
		beneficiary	address	description of gift
9.1	business or agricultural property			
9.2	personal chattels			
9.3	other			

10 gifts of money					
	beneficiary	address	free/ subject to tax	amount £	at what age

11 the rest of your estate				
	beneficiary	interest: absolute or nature of interest	proportion of residuary estate	at what age



12	are any of the following of concern to you: <ul style="list-style-type: none"> • your spouse may re-marry and leave your estate elsewhere • the divorce of a beneficiary • your beneficiary wasting the legacy • inheritance tax • your assets being used to fund your nursing care and nothing being available to your beneficiaries 	please tick if applies
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13	who will inherit your estate if neither your family nor those listed in 11 above survive you	
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instructions for power of attorney

14	you may wish to consider granting a lasting power of attorney. This is a means of ensuring that your affairs are dealt with by the person of your choice if you become incapable of doing so yourself. Things to consider include:	
	property and affairs and/or welfare	
	joint/together/substitute	
	certificate provider	
	persons to be notified of registration (up to 5)	

title deeds

15	where are your title deeds stored?	
16	do you know if your ownership is registered with the Land Registry? - you may wish to consider, for added security, having your title registered	





15	date of completion of this form	
16	completed by	

Please note: completion of this form will give us useful guidance on your assets and priorities to assist us in the drafting of your Will and/or Lasting Power of Attorney.

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