**PRE-MEETING**

**WILL QUESTIONNAIRE**

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**Matters to consider prior to your meeting**

This form is meant to help you start to pull your thoughts and ideas together concerning the preparation of your Will. They will not construe your instructions but are there to act as a springboard for our discussion and to allow you to pull together some of the information needed.

During our meeting we will discuss your thoughts and you will have an opportunity to ask as many questions as you like in order for you to be able to provide instructions from a position of informed choice.

**Guidance on important terms**

**Executors**

Your Executors are the individuals who are legally responsible to deal with your assets and debts following your passing (commonly referred to as your estate) and to administer your estate in accordance with the law and the terms of the Will. You can have between 1 and 4 Executors. You can have some primary Executors to be appointed in the first instance but substitutory Executors to be appointed in the event that the primary Executors are unwilling or unable to act (e.g. if they have passed away before you). It is of vital importance to consider the practicalities of the appointment of your Executors and who would be in the best position to be able to administer your estate effectively. You should think about such matters as:

1. Who are they and what is their relationship to you?
2. Where do they live?
3. Their age and general state of health.
4. Their capacity to be able to deal with potentially complex legal transactions in an emotionally charged environment.

**Trustees**

The Trustees are there to hold on to some assets of your estate pursuant to any specific instructions you have in your Will (e.g. £10,000 for my grandchild when they attain the age of 25 – and they are currently 4 years old). Often the Trustees are the same people as your Executors.

**Beneficiaries**

These are the individuals who will benefit from your estate when you pass away. There are a number of different types of beneficiary. It is up to you to decide who benefits from your assets and when. You can also decide what happens if your first choice has passed away before you (e.g. “if my son dies before me then to his children equally”). Once again it is important to think of your gifting practically. Naturally, we do not know what we will be worth at the time of our passing but you should try and ensure that gifts are realistic and achievable at all times.

**Estate**

This is a catch all term for all of your belongings that will be dealt with by your Executors. Please note that not all of your assets will form part of your estate and it is important to be aware of what will or will not be included. For example, a jointly held bank account would not form part of your estate and the balance would pass to the surviving joint owner regardless of what your Will might say.

Space for your notes : -

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **A. YOUR PERSONAL DETAILS** | | | | | | | | | | | |
| Surname: | | |  | | | Full Postal Address | | | | | |
|  | | |  | | |  | | | | | |
| Forenames: | | |  | | |
|  | | |  | | |
| Date of Birth: | | |  | | |
|  | | |  | | |
| Telephone No: | | |  | | | Email Address: | | |  | | |
|  | | | | | | | | | | | |
| *Do you need an individual Will?* | | | | *Yes/No* | | *Are you getting married soon?* | | | | | *Yes/No* |
| Do you need a couple’s Will (referred to as a mirror Will) | | | | | | Yes/No | | | | | |
| **B. SPOUSE OR PARTNER DETAILS** | | | | | | | | | | | |
| Surname: | | |  | | | Full Postal Address: | | | | | |
|  | | |  | | |  | | | | | |
| Forenames: | | |  | | |
|  | | |  | | |
| Date of Birth: | | |  | | |
|  | | |  | | |
| Telephone No: | | |  | | | Email Address: | | |  | | |
|  | | | | | | | | | | | |
| **C. EXECUTORS** | | | | | | | | | | | |
| **Executor 1** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| *Are they a primary executor or a substitutory executor?* | | | | | | | *Primary/substitutory* | | | | |
|  | | | | | | | | | | | |
| **Executor 2** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| *Are they a primary executor or a substitutory executor?* | | | | | | | *Primary/substitutory* | | | | |
|  | | | | | | | | | | | |
| **Executor 3** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| *Are they a primary executor or a substitutory executor?* | | | | | | | *Primary/substitutory* | | | | |
|  | | | | | | | | | | | |
| **Executor 4** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| *Are they a primary executor or a substitutory executor?* | | | | | | | *Primary/substitutory* | | | | |
|  | | | | | | | | | | | |
| **D. SPECIFIC GIFTS** *(e.g. personal items, chattels, vehicles, real estate)* | | | | | | | | | | | |
|  | Item | | | | Beneficiary Name | | | Beneficiary Address | | | |
| 1. |  | | | |  | | |  | | | |
| 2. |  | | | |  | | |  | | | |
| 3. |  | | | |  | | |  | | | |
| *If more, please add to notes* | | | | | | | | | | | |
|  | | | | | | | | | | | |
| **E. PECUNIARY LEGACIES** *(e.g. gifts of money)* | | | | | | | | | | | |
|  | Amount | | | | Beneficiary Name | | | Beneficiary Address | | | |
| 1. |  | | | |  | | |  | | | |
| 2. |  | | | |  | | |  | | | |
| 3. |  | | | |  | | |  | | | |
| *If more, please add to notes* | | | | | | | | | | | |
|  | | | | | | | | | | | |
| **F. RESIDUARY ESTATE** | | | | | | | | | | | |
| **Beneficiary 1** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| Percentage/Fraction of Residuary Estate | | | | | |  | | | | | |
| What is to happen if this person has passed away before you? | | | | | |  | | | | | |
|  | | | | | | | | | | | |
| **Beneficiary 2** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| Percentage/Fraction of Residuary Estate | | | | | |  | | | | | |
| What is to happen if this person has passed away before you? | | | | | |  | | | | | |
|  | | | | | | | | | | | |
| **Beneficiary 3** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| Percentage/Fraction of Residuary Estate | | | | | |  | | | | | |
| What is to happen if this person has passed away before you? | | | | | |  | | | | | |
|  | | | | | | | | | | | |
| **Beneficiary 4** | | | | | | | | | | | |
| Surname: | |  | | | | Full Postal Address: | | | | | |
|  | |  | | | |  | | | | | |
| Forenames: | |  | | | |
|  | |  | | | |
| Percentage/Fraction of Residuary Estate | | | | | |  | | | | | |
| What is to happen if this person has passed away before you? | | | | | |  | | | | | |
|  | | | | | | | | | | | |
| **G. FURTHER POINTS TO CONSIDER** | | | | | | | | | | | |
| Do you currently have any minor children (i.e. under 18 years of age)? | | | | | | | | | | Yes/No | |
|  | | | | | | | | | | | |
| Do you own any significant assets abroad? | | | | | | | | | | Yes/No | |
|  | | | | | | | | | | | |
| Do you think you are currently worth more than £500,000 as an individual or £1,000,000 as part of a couple? | | | | | | | | | | Yes/No | |
|  | | | | | | | | | | | |
| Do you have any form of visual impairment? | | | | | | | | | | Yes/No | |
|  | | | | | | | | | | | |
| Do you feel that there is somebody who may wish to contest your Will or take issue with your wishes? | | | | | | | | | | Yes/No | |
|  | | | | | | | | | |  | |
| **H. MISCELLANEOUS NOTES** | | | | | | | | | | | |
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