

WILL QUESTIONNAIRE

Please complete and return to us by email, post or fax. We will then telephone you to clarify your questionnaire instructions where necessary and let you know what our charges will be before you are committed to instructing us.

1. CLIENT CONTACT DETAILS			
Full Name			
Alias or professional name, if any. Are any assets held in this alternative name? Please specify.			
Address			
Postcode			
Email		To receive email updates from Callaghans, tick here	<input type="checkbox"/>
Tel. No. (day)		Tel. No. (eve)	
Date of Birth			
Occupation			
Marital Status	Single / Widow(er)/Married/Divorced/Co-habitee (please delete as appropriate)		

2. EXISTING WILL	
Do you have an existing Will?	Yes / No
If yes, with whom is it lodged?	

3. SPOUSE/PARTNER	
Full Name	
Address (if different)	
Postcode	
Date of Birth	
Occupation	
Marital Status	Single / Widow(er)/Married/Divorced/Co-habitee (please delete as appropriate)
Existing Will?	Yes / No

4. PROPERTY TO BE COVERED BY THIS WILL	
Worldwide	
UK Only	
Other	

5. DOMICILE	
Domicile – specify if not	
England & Wales.	

6. DISPOSAL OF BODY – SPECIAL DIRECTIONS	
Burial	
Cremation	
Donation for Medical Research	
Other	

7. CHOICE OF EXECUTORS

<i>Please provide:</i>	<i>Full Name</i>	<i>Address</i>	<i>Relationship to You</i>
Professional			
Other 1			
Other 2			
Other 3			
Substitute			

NB. Two will be required if (1) there are potentially minor beneficiaries or a trust is to be created under the Will and/or (2) you own a property.

Gift to Executor for acting?

8. CHILDREN

<i>Please provide: Full Name</i>	<i>Address</i>	<i>Date of Birth</i>	<i>Status*</i>
1.			
2.			
3.			
4.			
5.			
6.			

* Natural, Illegitimate, Adopted, Mentally Handicapped, Stepchild

9. GRANDCHILDREN

<i>Please provide: Full Name</i>	<i>Address</i>	<i>Date of Birth</i>	<i>Name of Parent</i>
1.			
2.			
3.			
4.			
5.			
6.			

10. GUARDIANS OF INFANT CHILDREN

<i>Please provide: Full Name</i>	<i>Address</i>	<i>Date of Birth</i>	<i>Name of Parent</i>
1.			
2.			
3.			
Is there another parent who will have parental responsibility?			
In cases of non-marriage/divorce/separation;			
(a) Who has "parental responsibility" for the child?			
(b) Who has the benefit of a "residence order"?			
(c) Is the other parent still alive?			

11. INHERITANCE (PROVISION FOR FAMILY AND DEPENDANTS) ACT CLAIMS

Do you have any of the following for whom it is intended to make no provision in your Will?

(a) Spouse?	
(b) A former spouse who has not remarried?	
(c) A person (other than a former spouse) who lived with you as husband/wife within the last two years?	
(d) A child?	
(e) A child of the family treated as such by you in relation to your marriage?	
(f) Any other person who is being currently maintained, wholly or partly, by you?	

12. LEGACIES

It is necessary to clarify the following points in relation to each legacy:

- (i) If the gift is of personal possessions do you wish instead to make these over to the Executors or other named persons to distribute in accordance with a non-binding letter of wishes (useful for jewellery or small personal items).
- (ii) Where any property is to be given as a specific legacy and is subject to a mortgage or charge, is the gift to be free from or subject to the repayment of this expense? If it is free from charge then from where is the liability to be met?
- (iii) Do you wish to delay payment to a legatee until they reach 18 (or later)?

(a) Cash Legacies

	<i>Amount</i>	<i>Full Name and Address of Legatee</i>	<i>Free/Subject to Tax</i>
(i)			
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

(b) Specific (i.e. non-cash) Legacies

Do you wish to leave a letter of wishes as set out above y/n

	<i>Amount</i>	<i>Full Name and Address of Legatee</i>	<i>Free/Subject to Tax</i>
(i)			
(ii)			
(iii)			
(iv)			
(v)			

(c) Charitable Legacies

	<i>Amount</i>	<i>Full Name and Address of Legatee</i>	<i>Charity No (if known)</i>
(i)			
(ii)			
(iii)			

13. RESIDUE

	<i>Amount/ Proportion</i>	<i>Full Name and Address of Beneficiary</i>	<i>Relationship to Client</i>	<i>Age if under 18</i>	<i>Absolute/ Conditional</i>
(i)					
(ii)					
(iii)					
(iv)					
(v)					
(vi)					

14. FOREIGN PROPERTY

<i>Type</i>	<i>Location</i>	<i>Value</i>	<i>Is there a Foreign Will?</i>

15. ARE YOU A BENEFICIARY UNDER ANOTHER'S WILL OR TRUST?

Details of Trust	
Date	
Settlor	
Trustees	
Trust Manager	
Do you have a power of appointment – general or specific?	
If so, should it be specifically exercised in this Will?	
State reason why any such power is not to be exercised in the Will.	

16. ASSETS

<i>Item</i>	<i>Sole/Joint Ownership</i>	<i>Proportion</i>	<i>Value of Whole</i>	<i>Value of Interest</i>
Home				
Other Land/Buildings				
Personal Possessions				
Car				
Bank Accounts				
Building Society Accounts				
Business Property				
Agricultural Property				
Quoted Shares				
Unquoted Shares				
Unit Trusts / Investment Trusts				
Peps				
Insurance Policies: Life				
Insurance Policies: Pension				
Insurance Policies: Investment				
National Savings Accounts				
Premium Bonds				

17. ASSETS cont.

<i>Item</i>	<i>Sole/Joint Ownership</i>	<i>Proportion</i>	<i>Value of Whole</i>	<i>Value of Interest</i>
Lifetime Gifts – to whom and when made?				
Other				
Estimated Total Value £				

18. LIABILITIES

<i>Type</i>	<i>Secured / Unsecured</i>	<i>Indemnity Insurance</i>	<i>Amount</i>
Mortgage			
Bank Overdraft			
Other			
Estimated Total Value £			

19. PENSIONS

Any nominations as to recipient of fund given to Trustees of a pension scheme?		
If so, whom?		
<i>Name of Scheme</i>	<i>Address of Trustees</i>	<i>Pension No. (if any)</i>

FOR OFFICE USE ONLY:

Date received instructions:

Fee earner:

Date draft required (specify reason for urgency):

Checked by:

Does execution of new Will require supervision: Yes / No