

WILL QUESTIONNAIRE

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Inside this issue:

1. FULL NAME:
2. ADDRESS:
3. BURIAL OR CREMATION?
4. FULL NAME OF SPOUSE:
5. NAME AND AGE OF CHILDREN OF PRESENT MARRIAGE:
 - (a)
 - (b)
 - (c)
 - (d)
6. HAVE YOU OR YOUR SPOUSE BEEN MARRIED BEFORE?
7. IF THE ANSWER TO 6 IS YES, SET OUT THE NAMES AND AGES OF ANY CHILDREN OF YOUR PREVIOUS MARRIAGE(S):
SELF
 - (a)
 - (b)
 - (c)SPOUSE
 - (a)
 - (b)
 - (c)

Contacts

For further information, please contact your usual Leeds Day contact or

St Neots Office
01480 474661

Huntingdon Office
01480 454301

St Ives Office
01480 464600

Email: wills@leedsday.co.uk

For a full list of our offices and people please visit

www.leedsday.co.uk

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8. NAMES AND ADDRESSES OF PROPOSED EXECUTORS:

FIRST EXECUTOR

FULL NAME:

ADDRESS:

POSTCODE:

SECOND EXECUTOR

FULL NAME:

ADDRESS:

POSTCODE:

9. NAME AND ADDRESS OF GUARDIANS (ONLY RELEVANT IF THERE ARE INFANT CHILDREN):

FIRST GUARDIAN

FULL NAME:

ADDRESS:

POSTCODE:

SECOND GUARDIAN

FULL NAME:

ADDRESS:

POSTCODE:



Lexcel
Practice Management Standard
Law Society Accredited

Huntingdon 01480 454301
St Ives 01480 464600
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10. PECUNIARY LEGACIES: AMOUNT, FULL NAME, ADDRESS OF EACH LEGATEE:

- (a)
- (b)
- (c)
- (d)

11. SPECIFIC LEGACIES OF PROPERTY: IDENTIFY THE PROPERTY AND GIVE THE FULL NAME AND ADDRESS OF EACH LEGATEE:

- (a)
- (b)
- (c)
- (d)

12. BENEFICIARIES OF THE REST OF THE ESTATE (RESIDUE):

13. SUBSTITUTE BENEFICIARIES OF RESIDUE:

14. AT WHAT STAGE DO YOU WISH THE BENEFICIARIES TO INHERIT THE RESIDUE?

15. WHO SHALL RECEIVE THE RESIDUE SHOULD THE BENEFICIARIES DIE BEFORE YOU?

16. COMPLETE THE FOLLOWING SCHEDULES TO HELP YOUR SOLICITOR ASSESS THE INHERITANCE TAX POSITION:

ASSETS

Assets	Approximate Value		Tick if jointly owned
	You	Your Spouse	
House			
Contents			
Car			
Jewellery			
Cash:	Bank		
	Building Society		
Quoted shares			
Partnership share or value of a sole business			
ISAs etc			
Unlisted stocks and shares (eg in a private company)			
Other assets, including non-UK (please specify)			
Liabilities			
Mortgage			
Other			



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LIFE ASSURANCE POLICIES

Pension scheme or policy	Amount of death benefit	Widow's or wid- ower's pension	Is death benefit in trust?	Nomination form com- pleted

PENSION DEATH BENEFITS

Pension scheme or policy	Amount of death benefit	Widow's or wid- ower's pension	Is death benefit in trust?	Nomination form completed

17. HAVE YOU OR YOUR SPOUSE MADE ANY SUBSTANTIAL GIFTS IN THE LAST 7 YEARS?



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