

WILL QUESTIONNAIRE

Inside this issue:

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

The information contained in this note is correct to the best of our knowledge at the time of publication. It is intended as a general guide only and should not be taken as specific advice.

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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)

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:

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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

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		Approximate Value		
Assets		You	Your Spouse	Tick if jointly owned
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				

Inside this issue:**LIFE ASSURANCE POLICIES**

Life insurance company	Policy number	Sum as-sured	Premiums	Purpose of policy	Whether or not in trust

PENSION DEATH BENEFITS

Pension scheme or policy	Amount of death benefit	Widow's or widower'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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