

# Will questionnaire

Personal and family details	Self	Spouse/partner
Full name		
Any other name by which you are known		
Address		
Telephone numbers	Home: Work: Mobile:	Home: Work: Mobile:
Occupation	Employer: Annual salary:	Employer: Annual salary:
Marital status	Please tick where appropriate: <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Cohabiting <input type="checkbox"/> Widowed <input type="checkbox"/> Engaged	Please tick where appropriate: <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Cohabiting <input type="checkbox"/> Widowed <input type="checkbox"/> Engaged
Email address		
Date of birth		
Place of birth and nationality		
Date of previous will (if any and where held including any foreign wills)		

Please provide full details of any children. If any are from a previous relationship please indicate below if the child is yours or your spouse/partner's.

Full name of children	Date of birth	Please tick if a child is from a previous relationship
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse
		<input type="checkbox"/> self <input type="checkbox"/> spouse

Please name anyone you or your spouse/partner support financially or anyone who lives in a property you or your spouse/partner own. State their relationship to you or your spouse/partner (if any).

Full name	Date of birth (if under 18)	Relationship

### Assets and liabilities with approximate values

Please estimate the value of the following:

Assets	Self	Spouse/partner	Joint
<b>House</b>			
<b>Other properties</b> (please list addresses)			
<b>Savings/investments</b>			
<b>Businesses</b> (please provide details if any)			

Continued...

Assets	Self	Spouse/partner	Joint
<b>Death benefit of pensions</b> (please list if more than one)			
<b>Life policies</b> (please list if more than one)			
<b>Car(s)</b> (please list if more than one)			
<b>House contents and personal items such as jewellery etc.</b> (please estimate total value)			
<b>Assets outside UK</b> (please list if any)			
<b>Trusts that you benefit from</b> (please list if any)			
<b>Gifts of more than £1,000 which you have made in the last 7 years</b> (please list if any)			

Please estimate the value of the following:

Liabilities	Self	Spouse/partner	Joint
<b>Mortgage</b>			
<b>Other loans</b> (please supply details)			

## Provisions for your will

Funeral wishes	Self	Spouse/partner
Do you wish to be buried/cremated or leave your body to science?		

Executors and Trustees	Self	Spouse/partner
<p><b>Who would you like to act as your Executors or Trustees?</b></p> <p>Remember: Executors can be beneficiaries too.</p> <p>You should name at least two Executors and Trustees if any of your beneficiaries are minors.</p> <p>Brabners Chaffe Street as solicitors can carry out this role for you if you wish.</p>	<p>Full name:</p> <p>Address:</p> <p>Full name:</p> <p>Address:</p>	<p>Full name:</p> <p>Address:</p> <p>Full name:</p> <p>Address:</p>
<p>If you would like your spouse/partner to be your only Executor and Trustee if you die first please indicate here.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

Guardians (for any children under 18)	
<p>Full name:</p> <p>Address:</p> <p>Relationship to you (if any):</p>	<p>Full name:</p> <p>Address:</p> <p>Relationship to you (if any):</p>

Legacies	
<p>Do you wish to make a gift of a sum or money or an item to any person or to charity?</p> <p>(please tick as appropriate)</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>

Name of beneficiary/charity	Amount/item	If you have a spouse/partner please tick when this gift should take place
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death

Continued...

Name of beneficiary/charity	Amount/item	If you have a spouse/partner please tick when this gift should take place
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death
		<input type="checkbox"/> 1st death <input type="checkbox"/> 2nd death

Gifts of the remainder of your estate (known as the Residue)	Name and address	% Share (and age to receive and any conditions if relevant)

**If all else fails...** If you wish, please say what you would like to happen to your assets if your main beneficiaries above all die before you or with you. Please give full details of names addresses and relationship to you.



**Any other information.** Please use this space to provide us with any other relevant information or in case you need more space to answer any of the other questions.

IMPORTANT – please give details if any of your beneficiaries need to have someone else look after his or her finances because of any sort of mental or physical impairment.

## Signatures

Signed	
Dated	

Signed	
Dated	

Please return your completed questionnaire to:

**Richard Bate, Brabners Chaffe Street LLP, 55 King Street, Manchester M2 4LQ**  
Telephone: 0161 836 8840 Email: richard.bate@brabnerscs.com

**Mark Feeny, Brabners Chaffe Street LLP, Horton House, Exchange Flags, Liverpool L2 3YL**  
Telephone: 0151 600 3450 Email: mark.feeny@brabnerscs.com

**Stephen Marriott, Brabners Chaffe Street LLP, 7-8 Chapel Street, Preston PR1 8AN**  
Telephone: 01772 823 921 Email: stephen.marriott@brabnerscs.com

### Liverpool

Horton House, Exchange Flags, Liverpool L2 3YL

**0151 600 3000**

### Manchester

55 King Street, Manchester M2 4LQ

**0161 836 8800**

### Preston

7-8 Chapel Street, Preston PR1 8AN

**01772 823921**