**Background Questionnaire Wills-made-simple.com**

**Full Name:**

**Address & Contact Telephone Number:**

The following information will form the basis for discussing the contents of your will. Please print or write your answers as clearly as possible in permanent ink.

1. Date of birth:
2. Full name and date of birth of wife/husband or partner (*If you have been married before and widowed, please let us know as there are Inheritance Tax implications*):
3. Please list any children with full names, addresses and ages. You should include details of all children, even if you intend to make no provision for them (disinheritance).
4. Who would look after any children under 18 years old (if applicable) if both parents died?
5. Please list any ***other*** dependents with addresses and ages, and state their relationship (if any) to you:
6. Please list any other family or friends you may want to leave a gift:
7. If there is a charity you wish to leave a gift please give full details below of the charity name and registration number (if you know it):
8. Please state if you have any particular funeral wishes (eg. “green”/cremation/burial/non-religious)
9. Do you have any pets that may need to be taken care of?
10. If you have previously made a will, please say when and who is storing the original document?
11. Please list details of any lifetime gifts you have made of more than £5,000 in value on any one occasion.
12. **Approximate** value of your assets – if owned jointly you need to put in the “Your Share” column the amount of your share, eg 1/2 share or 1/3 share.

Please list main items of value such as your house(s) car, share of any business, furniture, bonds, savings and investments, any shares, ISA’s, life policy amounts due when you die, savings certificates, jewellery etc., and any debts owed to you. Use an extra sheet of paper if you need to. Please specify if any assets are held in a foreign jurisdiction (eg off-shore accounts/holiday home):

|  |  |  |  |
| --- | --- | --- | --- |
| **Items** | **Total Value** | **Your Share** | **Owned with Whom?** |

1. Do you owe money on mortgages, overdrafts, loans or other debts? If so, please list the details. If any of the debts are owed jointly with another person, please do fill in the details asked for:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Creditor** | **Amount Owing** | **If a joint debt, your share of it** | **Name of Joint Debtor (if appropriate)** | **When repayment is scheduled (if known)** |

1. Please tick to indicate the total value of your property, including the value of your share of any jointly owned property:

(a) Up to £100,000 [ ] (b) £100,000 to £250,000 [ ] (c) £250,000 to £400,000 [ ]

(d) £400,000 to £650,000 [ ] (e) **Over £650,000** [ ] (e) Over £1,000,000 [ ]

1. Please specify any gifts of things or money (eg specific objects or cash legacies) you want to make to family and others:

Individuals:

Charities:

1. For the rest of your estate, who do you want to benefit and how? Write down your wishes/feelings as best you can. You might want to use fractions or percentages to express how you would like to divide things.
2. Last but not least, who will be the executors of your will? This does not have to be a professional or an outsider, and it can be a surviving wife/husband etc., or other beneficiaries.

**Note about jointly owned assets:**

Your will cannot deal with many jointly owned assets unless action is taken.

If you jointly own a property as “*joint tenants*” then the survivor will inherit the half of the first to die. This may be true of your house or other property and jointly owned investments. If this applies, by changing the basis of ownership to “tenants in common” you can then leave your personal share to someone else. That could be the other joint owner **or** someone else entirely, or by making a gift into “trust”.