

# Making a Will Pre Questionnaire

A lot of the information a solicitor will require in order to compile your will can be completed below in advance speaking to them.

Therefore you may wish to complete some of the information below:

### YOUR DETAILS

Forename(s)	
Surname	
Previous Name	
Home telephone number	
Work telephone number	
Date of Birth	
Place Of Birth	
National Insurance number	

### FAMILY DETAILS

Marital Status	Yes <input type="checkbox"/> No <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/>
Name of Partner	
Name(s) of children (include their ages)	
Name(s) of step-children (include their ages)	

Other family/dependants	
-------------------------	--

## EXECUTORS

The Executor usually has to apply for probate of the Will to prove that he or she is the person with the legal authority to deal with the estate of the deceased. As a rule you would identify 2 – 4 executors.

## FINANCIAL DETAILS

Assets that are in your sole name – List major assets and an approximate value, these could include.
Your home, other property, bank accounts, savings accounts, bonds, trusts, shares, antiques, jewellery and any other items of value, etc,
Assets that are in joint names - as above.
Businesses owned - (if so you may require specialist legal advice)
Property owned abroad (include address and whether you are the sole owner if not include part owners name)
Have you made a foreign Will?
Place Of Birth

National Insurance number

### **CURRENT FINANCIAL LIABILITIES**

Mortgages:

Overdraft:

Loans:

Hire purchase agreements:

Other liabilities:

### **GUARDIANS**

If you have children under 18 - detail the name, address and relationship (as applicable) to you of your chosen guardians should your children be orphaned.

### **BENEFICIARIES**

Make a list of all the people you would like to benefit from your estate, include their name(s), address(s) and what you would like to leave them.

If married or in a long-term relationship do you want to leave the majority of your estate to your spouse/partner?

If yes, detail any gifts you wish to make before the remainder of your estate is given to your spouse/partner. If no, do you want your estate to pass to your children and if so do you want them to be a certain age before they inherit (i.e. 18, 21, 25 etc) and if your children die before you, do you want to make provision for your grandchildren, or if you have more than one child, do you want the remaining estate divided equally between the surviving children?

Do you wish to make gifts to extended family/friends/charities? If so provide further details i.e. are these to be specific monetary amounts or possessions?

Consider where you would like the legacy to go in the event the beneficiary pre-deceases you, i.e. that the gift be left to charity or the beneficiaries family etc.

## FUNERAL DETAILS

I would like to a Burial/Cremation?

I have a funeral insurance policy (list policy details):

## REGISTER

I request that my Will is registered with Certinty.co.uk the National Will Register.