

## 2. Questionnaire

### ***Part A – Essential information that your solicitor will need from you***

#### About yourself

First names:

Surname:

Full postal address:

Telephone: (home)

Telephone: (office)

E-mail address:

Date of birth:

Place of birth:

Occupation:

Marital status: [please tick relevant section]

*Single*

*Married*

*Living as married*

*Widow/Widower*

*Separated*

*Divorced*

Date of divorce:

Full name of former spouse:

#### About your spouse – if any

First names:

Surname:

Address [if different]:

Telephone: (home)

Telephone: (office)

E-mail address:

Date of birth:

Place of birth:

Occupation:

If applicable, please complete the following [ticking the relevant box]:

Is he/she *separated*

*divorced* ?

Date of divorce:

Full name of former spouse:

Your children – if any

First names

Surname

Date of birth

Your grandchildren – if any

First names

Surname

Date of birth

[Please indicate if any of these children/grandchildren are adopted, stepchildren or illegitimate]

The terms of your will

Do you wish to be buried ?  cremated  ?

Do you wish to have your organs used for transplant or donation? Yes  No

Who would you wish to be the **Executors of your Will**? Please indicate their relationship to you (e.g. spouse, daughter, son, friend, solicitor, accountant, etc). Executors should be over the age of 18. You may appoint e.g. a solicitor or accountant as an Executor should you require an independent person, but they will charge for their services.

First names

Surname

Full Postal address

Age

Relationship

If you appoint your spouse as an Executor, you may be asked to suggest an alternative Executor in case your spouse dies before you or with you in a common accident:

First names

Surname

Full Postal address

Age

Relationship

If you have children under the age of 18, list details of people over the age of 18 who are willing to act as **guardians**. (One guardian is sufficient, but some prefer to appoint two in case one dies). Indicate their relationship to you (e.g. spouse, son, daughter, brother, sister, friend, etc)

First names

Surname

Full Postal address

Age

Relationship

**Part B – Financial information**

This checklist will help you to calculate the approximate value of your estate (i.e. your assets less your liabilities). Your solicitor may wish to know the approximate value of your estate in order to advise you on tax planning; current, approximate values will suffice. *If you own an asset jointly with your spouse (e.g. your home), please indicate this by putting its **total** value in the last column only.*

**Assets – state currency: UK£/other \_\_\_\_\_**

<b>Item</b>	<b>Owned by you</b>	<b>Owned by spouse</b>	<b>Jointly owned</b>
House			
Other property			
Furniture			
Household items			
Jewellery			
Clothing			
Cars			
Caravan/boat			
Bank accounts			
Building society accounts and TESSAs			
National savings (e.g. certificates, accounts, bonds)			
Other investments (e.g. shares/PEP/ISA)			
Life insurance			
Endowments or savings plans			
Share in a business and/or business assets			
Pension benefits (i.e. death in service)			
<b>TOTALS</b>			

**Liabilities/debts – state currency: UK£/other \_\_\_\_\_**

	<b>Owed by you</b>	<b>Owed by spouse</b>	<b>Owed jointly</b>
Mortgage			
Bank loan			
Car loan			
Other loans			
Typical credit card debt (i.e. amount owing)			
Other			
<b>TOTALS</b>			

## Part C – What you want your will to achieve

This is designed to help you think through who you want to leave your estate to, and reflects the kind of questions a solicitor might ask. It is a useful exercise to complete it *before* you visit your solicitor.

1. Most **married couples** draft their wills so that on their death all of their estate goes to their spouse. But if your spouse is not alive at the date of your death, the estate is usually divided between any children equally at age 18 or 21. Should any of your children die before you, it is usual to allow their share to pass to their children (i.e. your grandchildren), again at the age of 18 or 21.

Do you wish to follow this standard pattern?    Yes                   No

You can in some circumstances state at which age any children/grandchildren can inherit their share. Do you prefer

18                   21

*If this is all you want your will to achieve, you can go straight to question 5. However if you do not wish to follow the pattern suggested in this section or are single, go to question 2.*

Should all your family die in a common accident, or if you don't have children or grandchildren, you need to think about what would happen to your estate then. Most partners wish their joint estate to be split 50/50 between each of their families, so you would need to tell your solicitors the names, addresses, ages and the relationship to you of the beneficiaries.

2. Do you wish to make a gift of any specific item (e.g. a piece of furniture)? If so, please give details.

Description	Beneficiary's full name and address	Age
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3. Do you wish to make any gifts of cash? If so, please give details. (For a gift to a charity, remember to give your solicitor its full name, address and charity number. For a church, give the dedication and parish /benefice name.)

Amount	Beneficiary's full name and address	Age
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4. To whom do you wish the remainder of your estate to go?

- to your spouse (or equally to your children if your spouse dies before you)  
 or to other persons

If to others, state the proportions to each, e.g. 'one quarter' or '10%' as follows:

Portion	Beneficiary's full name and address	Age
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5. If any of the following apply to you (or your spouse), please tick the relevant box and let your solicitor know the details of these or any other unusual factors:

Have any of your life insurances or pension benefits been written into trust or nominated to go to family members? Yes  No

Have you spent long periods of time out of your normal country of residence? Yes  No

Do you have any property/assets outside of your country of residence? Yes  No

Do any of the proposed beneficiaries under your will suffer from physical or mental incapacity? Yes  No

Have you ever changed your name or are you know by any other name? Yes  No

Do you have income from, or a share in, any trust? Yes  No

Do you expect your financial circumstances to change significantly in the near future? Yes  No

Have you ever received tax planning advice? Yes  No

Have you given away significant sums of money/property in the last 7 years? Yes  No

Are you employed?  self employed?

**Remember to take a copy of your existing Will(s), if you have one, to the appointment along with this questionnaire.**

Intercontinental Church Society, 1 Athena Drive, Tachbrook Park, Warwick CV34 6NL, United Kingdom. Tel: 01926 – 430 347; fax: 01926 – 888 092; IDD code: +44 1926 – E-mail: [jdhealey@ics-uk.org](mailto:jdhealey@ics-uk.org) Registered charity no.: 1072584

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