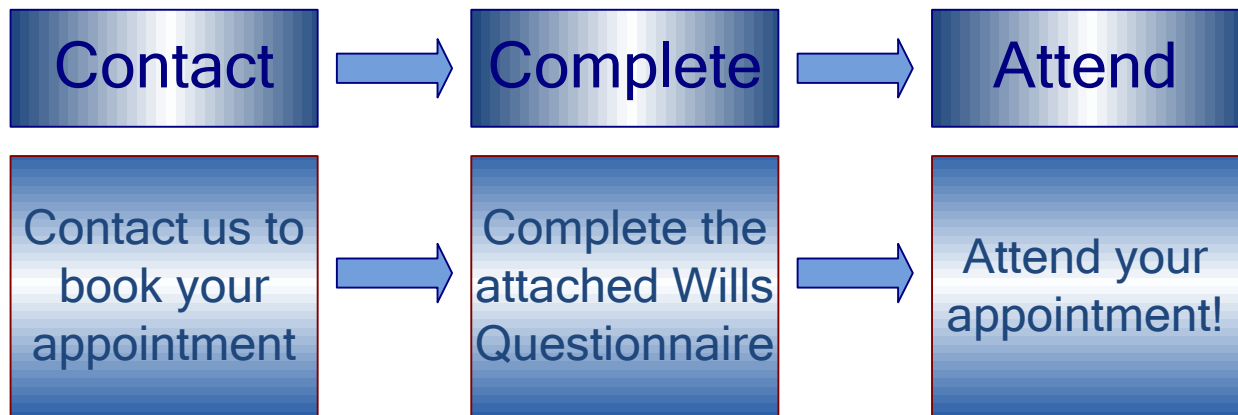




MAKE YOUR WILL IN THREE EASY STEPS:-



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THINGS YOU NEED TO KNOW BEFORE YOU START

Your Will provides what is to happen to your estate when you die.

However, your Will cannot say what is to happen to any of the following:-

- **JOINT PROPERTY:** - In such cases the property may pass on your death to the surviving joint owner(s) of the property in question.
- **PENSION BENEFITS:** - Certain benefits payable under pension policies may pass to persons nominated by you in a separate letter of nomination.
- **TRUSTS:** - Property held for you under certain types of trust will not pass under your Will on your death, but will be distributed in accordance with the terms of the trust document.
- **LIFE POLICIES:** - The proceeds under life policies written in trust for the benefit of named individuals will pass to those individuals, regardless of the terms of your Will.

Giving us the information requested overleaf will help us to prepare your Will quickly and accurately. You may not be familiar with some of the terms used in your Will., so here is a brief guide as to what we mean when we say.....

1. **Testator** (male) / **Testatrix** (female) - You, the person making the Will.
2. **Estate** - This is the collective term for the assets you own when you die.
3. **Executor(s)** - The person(s) you select to make sure that your estate is distributed in accordance with your wishes contained in the Will. You can appoint up to four, two is probably best. The Executors role is one of responsibility, and can be time consuming. You should consider whether you would like to appoint a professional Executor (this could be for example together with a family representative or friend). Some of the advantages of appointing a professional executor are:-
 - Relieves family or friends of worry and constraints upon their time
 - Professional expertise and advice is continually available during the administration period
 - Provides an "independent voice"; particularly important if you believe that there may be a dispute or conflict between the beneficiaries or family after your death
 - Continuity - you are safe in the knowledge that as we have assisted you during your lifetime we can wind up your affairs after your death
 - We have the background knowledge as to the reasons why you have made your Will and have received personal instructions from you as to how you want your estate to be dealt with which we will always endeavour to carry out on your behalf
4. **Guardians** - The person(s) you select to take care of any children you may have who are under 18 when you die. Guardians must be over 18.
5. **Beneficiary** - A person, or in some cases a class of persons (e.g. all your children/grandchildren) or in some cases a charitable body who benefit under a Will.
6. **Legacy** - An amount of money, a personal item or a share of your assets which you leave to a beneficiary. There are several types of legacies:-
 - 6.1. a specific legacy - personal items such as jewellery, ornaments, furniture, cars, caravans or CD collection
 - 6.2. a pecuniary legacy (somehow called a cash legacy) - a set sum of money left to a beneficiary or a number of beneficiaries
7. **Residue or Residuary Estate** - The residue of your estate is what remains after payment of debts and funeral expenses have been paid and any specific or pecuniary legacies left in your Will have been paid to the relevant beneficiaries

WILLS QUESTIONNAIRE

Section A : PERSONAL DETAILS

	FOR YOURSELF:	YOUR SPOUSE/PARTNER:
FULL NAME:		
FULL ADDRESS:		
HOME TEL NO:		
MOBILE TEL NO		
EMAIL		
DOB:		
STATUS:	<input type="checkbox"/> Married <input type="checkbox"/> Civil Partnership <input type="checkbox"/> Intending to marry or enter civil partnership <input type="checkbox"/> If not married are you living together <input type="checkbox"/> Divorced	<input type="checkbox"/> Married <input type="checkbox"/> Civil Partnership <input type="checkbox"/> Intending to marry or enter civil partnership <input type="checkbox"/> If not married are you living together <input type="checkbox"/> Divorced
DOMICILED IN UK FOR TAX PURPOSES:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
DO YOU HAVE ANY CHILDREN	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Please give full details:

NAMES OF CHILDREN	DATES OF BIRTH	ADDRESSES

Section B : ASSETS (nb if you are making a Will with your spouse/partner please provide full details of both of your assets)

1 : PROPERTY

Do you own your own property?

Yes No

Is this jointly owned with another person?

Yes, please provide details below of the share that you own, the names and addresses of the other joint owner(s) and whether it is held as joint tenants or tenants in common (if known)

No

DETAILS:

Where are the title deeds?

What is the approximate value of the property?

What is the amount of any outstanding mortgage?

How will the mortgage be paid off in the event of your death?

2 : BUSINESS INTERESTS

Are you self employed or a private company shareholder?

Yes No

Please provide details of any other business interests (including farming)?

3 : FOREIGN ASSETS

Please provide details of any foreign assets

4 : BANK/BUILDING SOCIETY ACCOUNTS

Please provide full details of all bank/building society accounts

5 : STOCKS/SHARES

Please provide full details of all stocks and shares

6 : LIFE INSURANCE POLICIES

Please provide full details of any life insurance policies

7 : PENSIONS

Please provide details of any pensions

8 : PERSONAL BELONGINGS (CHATELS)

Please provide details of any personal belongings (chattels)

9 : OTHER

If you have any other assets not included above please provide full details

Please Estimate the size of your Estate

Please Estimate the size of your spouse/partner's estate

WILLS QUESTIONNAIRE

Section C : EXECUTORS

Do you wish your surviving spouse/partner to act as your Executor?

Yes No

Yes No

Do you wish your surviving spouse/partner to act jointly with another Executor?

Yes No

Yes No

If yes please provide details below

If yes please provide details below

Would you like one or more partners from Thursfields LLP to act as Executors?

Yes No

Yes No

Please give full details of your Executors (nb even if you have requested that your spouse/partner be your Executor you will still need to provide details of Executors who will act in the event your spouse/partner being unable to act

NAME

ADDRESS

RELATIONSHIP TO YOU

Section D : GUARDIANS

Please give full details of Guardians for your children under the age of 18 years

NAME

ADDRESS

RELATIONSHIP TO YOU

Section E : SPECIFIC GIFTS

Please list any specific gifts, whether sums of money, personal belongings, gifts to charity

NAME	ADDRESS	RELATIONSHIP TO YOU	GIFT REQUIRED

Section F : RESIDUE - after payment of all of your debts, funeral expenses, taxes and specific gifts what is left over is the residue of your estate

	FOR YOURSELF:	YOUR SPOUSE/PARTNER:
Do you wish your spouse/partner to receive the whole of your residuary estate?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Who are the residuary beneficiaries (either on the second death if you have answered yes above, or on your death if you have answered no above)

NAME	ADDRESS	SHARE

WILLS QUESTIONNAIRE

If any of your residuary beneficiaries named above do not survive you would you be happy for their share to pass on to their own children?

Yes No, please provide details below as to where their share is to pass

Details:

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Section G : FUNERAL DIRECTIONS

Please confirm whether you would prefer to be buried or cremated and provide any other details as to your funeral wishes eg. Funeral directors, type of service, donations,etc

FOR YOURSELF:

YOUR SPOUSE/PARTNER:

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Section H : OTHER NOTES

Please provide any other information you think would be helpful

FOR YOURSELF:

YOUR SPOUSE/PARTNER:

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PLEASE REMEMBER TO BRING YOUR COMPLETED QUESTIONNAIRE WITH YOU TO YOUR APPOINTMENT!!!