

WILL INSTRUCTION QUESTIONNAIRE

WGA

Ward Gethin Archer

www.wga.co.uk

A) GENERAL INFORMATION

1.	Full name (including any aliases):			
	Address:			
	Postcode:			
	Telephone Numbers:	Home:		
		Work:		
		Mobile:		
	Email:			
	Date of Birth:		Occupation:	
Preferred method of contact?				

2.	Partner's full name:			
	Address: (if different from above)			
	Postcode:			
	Telephone Numbers: (if different from above)	Home:		
		Work:		
		Mobile:		
	Email:			
	Date of Birth:		Occupation:	
Is your partner your spouse or civil partner?			Yes <input type="checkbox"/>	No <input type="checkbox"/>

3.	Are you divorced?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	Have you had a civil partnership dissolved?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	Are you a widow(er)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If you are widowed please ensure that you complete section 10(b) on Page 6		

4.	Is there an existing will...			
	for you?		Yes <input type="checkbox"/>	No <input type="checkbox"/>
	for your partner?		Yes <input type="checkbox"/>	No <input type="checkbox"/>
Where are they kept?				

5.	Do you have children?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If 'Yes', please give details below, including any adopted children.		

Children's Details:			
a)	Full name:		
	Address:		
	Postcode:		
	Age:		
b)	Full name:		
	Address:		
	Postcode:		
	Age:		
c)	Full name:		
	Address:		
	Postcode:		
	Age:		
d)	Full name:		
	Address:		
	Postcode:		
	Age:		

6.	Is any child...		
a)	from a previous relationship?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
b)	adopted?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
c)	a step-child?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
d)	subject to a "residence order"?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
e)	in the care of another person who may or may not have a "residence order"?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
f)	Is any child's natural parent (other than detailed above) living?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

7.	Guardians – For children under 18 years			
	Your Guardians will be responsible for bringing up your children. Please specify two and their relationship to you (if any) For reasons, which may be explained, try and ensure you do not appoint the same people as both Guardians and Executors (see question 8 below)			
a)	Full name:			
	Address: (if different from above)			
	Postcode:			
	Occupation:		Relationship:	
b)	Full name:			
	Address: (if different from above)			
	Postcode:			
	Occupation:		Relationship:	
	Is there anyone who has been appointed by the Court as having “Parental Responsibility” for any child?			Yes <input type="checkbox"/> No <input type="checkbox"/>

8.	Executors			
	Your Executors will be responsible for collecting and securing assets, paying your debts, funeral expenses and any tax and, for distributing your estate in accordance with the terms of your Will. A husband and wife/civil partner will usually appoint each other and on the death of the survivor of them appoint two other persons. Your children who are adults may act. You will need to have a minimum of two Executors if there are minor beneficiaries.			
a)	Full name:			
	Address: (if different from above)			
	Postcode:			
	Occupation:		Relationship:	
b)	Full name:			
	Address: (if different from above)			
	Postcode:			
	Occupation:		Relationship:	

9.	Domicile / Residency – General Notes UK residents are liable to UK Income Tax on UK and foreign income. <ul style="list-style-type: none"> ▪ Non-UK residents are subject to Income Tax only on the income arising in the UK and not that abroad. ▪ If you are resident in the UK but not domiciled in the UK, then you pay tax on foreign income only in so far as it is brought into the UK. ▪ Residence and Ordinary Residence – the requirements laid down by HM Revenue and Customs to determine whether or not you fall into either definition are complex and regrettably beyond the scope of this note. ▪ Domicile – is where you have your permanent home (i.e. your place of birth). Your domicile may affect taxes payable in the event of your death. 	
a)	Where are you resident for Income Tax purposes?	
b)	Where is your country of domicile?	
c)	To where do you intend to retire?	
d)	Is the Property to be covered by this Will...	
	Worldwide?	
	UK only?	
	Other specifically?	
Please note – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we will either provide such advice for an additional fee or we will direct you to alternative specialist advice.		

B) SPECIFIC ISSUES – Please give brief details

10.	Do any of the following affect you?	
a)	Is your estate worth more than £325,000?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<p>Please note – It is possible that your estate will be subject to Inheritance Tax on your death and that the amount of tax charged will depend on the nature of the provisions contained in your Will. For this reason, advice on Inheritance Tax is commonly a feature of a comprehensive Will drafting service unless expressly excluded.</p> <p>We will advise you as to the likely Inheritance Tax consequences of the provisions which you have asked us to include in your Will on the basis of the information which you have given to us. However, we will not advise you as to the most efficient method of drafting your Will or give advice in lifetime planning as part of our standard Will drafting service. However, if you ask us to do so we will provide such advice for an additional fee.</p>	
b)	Widow(er)/Civil Partners	
	(i) When did your spouse/partner die?	
	(ii) Did you inherit the whole of your spouse/partner's estate?	Yes <input type="checkbox"/> No <input type="checkbox"/>
c)	Are any of your beneficiaries mentally impaired?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	If 'Yes', please state their name(s) and age(s)	
d)	If you are divorced / separated / previous civil partnership dissolved, have your financial affairs been sorted out	Yes <input type="checkbox"/> No <input type="checkbox"/>
e)	If you have children from a previous relationship, are you keen to protect their interests?	Yes <input type="checkbox"/> No <input type="checkbox"/>
f)	Do you have any dependants, other than children? e.g. Your spouse, Former Spouse, Civil Partner, Former Civil Partner, Co-Habitee, Elderly Relatives	Yes <input type="checkbox"/> No <input type="checkbox"/>
g)	Are there any dependants you do not intend to provide for in this will?	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<p>Please note – The Inheritance (Provision for Family and Dependants) Act 1975 may enable certain persons to seek additional provisions out of your estate after your death. If an application is made under this act it is likely to involve your estate in expense and may result in a variation of the dispositions made in your Will.</p> <p>If the information which you provide to us for the purposes of preparing your Will suggests that there is a real risk of such an application being made in respect of your estate, we will advise you that this is the case. However, we will not offer more detailed advice in relation to the 1975 Act unless you ask us to do so and, in those circumstances, an additional fee will be charged.</p>	
h)	Do you have cremation / burial wishes? If 'Yes', please give details	Yes <input type="checkbox"/> No <input type="checkbox"/>
i)	Do you want the cost of any memorial to be paid for out of your estate?	Yes <input type="checkbox"/> No <input type="checkbox"/>

List of Assets

Please include any properties, bank accounts, investments, pensions, life assurance policies, interests in Trust Funds, digital assets and any other assets you own.

Please also list any substantial gifts you have made within the last 14 years.

Held in your name only	Values £
Held Jointly (i.e. in your name and the name of another):	Values £

Please note – In order for our firm to be able to prepare your Will, you must provide details of the nature and extent of the property which you own. It is your responsibility to ensure that the information which you provide is accurate and up to date.

There are assets which may not pass under the terms of your Will, these include:

- property held jointly with another (unless there is an agreement to say otherwise);
- pension funds and death in service schemes where the Trustees of the funds have a discretion to distribute any lump sums payable following someone’s death.
- proceeds of a Life Assurance Policy written in trust.

Please make sure that any relevant Beneficiary Nomination Form is completed and kept up to date to ensure that the relevant trustees are aware of your wishes. This can usually be done by contacting the relevant company involved.

11.	Specific Gifts e.g. jewellery, property, shares
Please ensure you provide full and accurate descriptions. If there is confusion on your death, the gift may fail for uncertainty. A Beneficiary is the person you would like to receive the gift.	

Item	Full name & address of the Beneficiary and age at which they are to inherit	Is the gift to be free of / subject to tax / mortgage?

Ask yourself:

a) Do you want all of these gifts to occur on your death, or after the death of your spouse / partner?

b) Has any gift been used as a security for a loan and if so is it given free of that Loan?

12.	Legacies i.e. a sum of money
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Amount £	Full name & address of the Beneficiary and age at which they are to inherit	Is the gift to be free of / subject to tax / mortgage?

13.	Remainder of your estate	
	This is everything that is left after the payment of your debts etc. and of the specific gifts and legacies given in 11 and 12 above.	
a)	Do you want the remainder of your estate to go to your spouse / partner / civil partner?	Yes <input type="checkbox"/> No <input type="checkbox"/>
b)	If not, where do you want it to go? To your children? If so, in what shares and at what age? Other relatives? Friends?	
c)	If those in (a) and (b) above predecease you, where do you want it to go? If a child had predeceased you leaving children of their own (your grandchildren), do you want that child's share to be split between their children? If so in what shares and at what age?	

PLEASE SIGN

I have given the relevant information you need to know to make a suitable Will for me.

I understand that if I have any specific requirements you will be willing to offer this at an additional charge.

Please prepare a Will for me based on the information I have given.

When the instructions are joint, would each person please sign.

Signed:.....

Signed:.....

Please return to Ward Gethin Archer

ASK ANY QUESTIONS BELOW