

Will Questionnaire



Single Will	£350 +VAT
Mirror Will	£450 +VAT
Declaration of Trust	£250 +VAT

Do you have an existing Will? Yes No

Your Full Name

Your address

Postcode

Do you use any other name? If yes, what is that name and in what context do you use it.

Date of Birth

Nationality

Your partner/spouses full name

Date of Birth

Nationality

Are you married? Yes No

If yes, Marriage date

If you are intending to get married in the near future, would you want the Will to remain effective after the marriage?

Yes No

Important points to note

- This questionnaire does not look at the inheritance tax implications of dealing with your estate. If you are worried about inheritance tax then you should consider having a meeting with one of our solicitors.
- Wills are automatically revoked by Marriage or Civil Partnership unless you make it clear that you do not want your will revoked by your Marriage.
- Common law marriage has no legal effect and just because you are in a long term relationship does not mean that your partner has automatic rights against your estate, however he or she may have some rights which might be supported in Court. If you want further advice on this you will need to have a meeting with one of our solicitors.
- If you own assets in another country it may be necessary to have a will in that country.
- If you own a house jointly with someone else ownership passes automatically on death UNLESS you own as Tenants in Common. If you are in doubt about ownership we can investigate but there will be a small charge for this. Most other jointly owned property i.e. bank accounts, furniture etc. will pass automatically.
- Pension benefits and Death in Service benefits do not usually pass under your Will and you should sign a nomination form in respect of these.



London

+44 (0)203 755 0557

Camberley

+44 (0)1276 686 222w

Wokingham

+44 (0)118 977 4045



info@herrington-carmichael.com



www.herrington-carmichael.com

Do you have any children? Yes No

If yes, please state names & dates of birth?

Date of Birth

Date of Birth

Date of Birth

Date of Birth

Who do you want as Executor(s)?

(please provide FULL name(s), address and relationship)

Full Name

Address

Postcode

Relationship

Full Name

Address

Postcode

Relationship

Executors become the legal owners of your estate for the purposes of giving effect to your Will. Someone who inherits under your Will can be an Executor but it is sometimes necessary to consider if that person will be suitable.

Do you want to give any legacies to friends or relatives? If yes please provide details. (Legacies can be of specific items eg my jewellery, of cash or even of property)



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If you want to give lots of your personal effects to different people it may be better to say in your Will that you will leave separate instructions to distribute your personal possessions. Do you want to do this?

Yes No

Who is to be the main beneficiary of your estate

- spouse/partner/children/relatives/friend(s), please state:

Full Name

Address

Postcode

Full Name

Address

Postcode

Full Name

Address

If your children are under the age of 18 at what age do you want them to inherit? The law says they become entitled at 18 but many people think this is too young and common alternatives are 21/23/25, please state intentions:

Postcode

If you have young children who do you want as guardians?

(bear in mind that a parent almost always has parental rights, so it is usual to provide that) it is only after both parents have died that a guardian is appointed.

Full Name of Guardian(s)

Address

If any child of yours dies before you, would you want their children to inherit in their place?

Yes No If yes, Names

Postcode



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Full Name of Guardian(s)

Additional space below to write any further information - please specify what it relates to:

Address

Postcode

Do you wish to leave your body for medical research?

Yes No

Do you wish to donate your organs for transplantation?

Yes No

If yes, do you wish to donate all of your body?

Yes No

If no, please specify which parts of your body you wish to donate.

Is it your wish to be buried or cremated:

Please specify

Please detail any specific funeral instructions.

If you are having trouble submitting the form, please save and email to info@herrington-carmichael.com



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