

**NAME:**

**WILL INSTRUCTION QUESTIONNAIRE**

Thank you for your instruction to prepare your Will.

Please complete this questionnaire so that we have sufficient information to prepare a draft of your Will(s). If a question does not apply to you then simply mark it 'not applicable'.

Do not hesitate to contact **Jane Parker or Edith Longden on 0161 694 3090** or by email at [jane.parker@oneillpatient.co.uk](mailto:jane.parker@oneillpatient.co.uk) or [edith.longden@oneillpatient.co.uk](mailto:edith.longden@oneillpatient.co.uk) if you have any questions or queries about this questionnaire.



**O'Neill Patient**  
SOLICITORS LLP

Chester House  
2 Chester Road  
Hazel Grove  
Stockport  
Cheshire SK7 5NT

DX 15108 – Hazel Grove

**Please prepare:**

- A single Will for me only.
- Mirror Wills (similar Wills for me and my spouse/civil partner/partner (delete as appropriate)).

**Personal Details**

Title:	
Surname:	
Forenames:	
Date of Birth:	
Place of Birth:	
Full Postal Address:	
Postcode:	
Home telephone number:	
Work telephone number:	
Mobile telephone number:	
E-mail address:	
Are you married/in a civil partnership("CP")/cohabiting and if so please specify?  If yes please provide their details on the next page	Yes <input type="checkbox"/> No <input type="checkbox"/>

If you are co-habiting but not married/or in a registered CP are you contemplating marriage /registering a CP – if so we will make the Will in contemplation so if you do marry/register your CP it will not be revoked	
Please confirm you are UK domicile, if not please specify?	
Please advise whether you have any assets outside the UK and provide brief details	
Please advise whether you have made a Will outside the UK and if so, please provide details	
<p>Previous spouse/civil partner if so please confirm whether you are maintaining that person or that person is maintaining you</p> <p>If yes name of previous spouse/civil partner:</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>

**Personal Details (Spouse/Civil Partner/Partner)**

Title:	
Surname:	
Forenames:	
Date of Birth:	
Place of Birth:	
Full Postal Address:	
Postcode:	
Home telephone number:	
Work telephone number:	
Mobile telephone number:	

E-mail address:	
Previous spouse/civil partner? If yes name of previous spouse/civil partner:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Please confirm you are UK domicile, if not please specify?	
Please advise whether you have any assets outside the UK and provide brief details	
Please advise whether you have made a Will outside the UK and if so, please provide details	
Previous spouse/civil partner if so please confirm whether you are maintaining that person or that person is maintaining you  If yes name of previous spouse/civil partner:	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Children**

For each child please provide their full name, address and age.  
 If any children are from a previous relationship please provide full details.  
 Please provide names and ages of **all your children** whether they are benefiting in your will or not.

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**Grandchildren**

Please provide names and ages of any grandchildren.

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## **Guardians**

If you have a child or children under the age of 18 then we recommend that you appoint Testamentary Guardians. In the event that both parents die the Testamentary Guardians will look after the child/children until they turn 18.

If you would like to appoint Testamentary Guardians please complete the following section.

### **Guardian 1**

Title:	
Surname:	
Forenames:	
Full Postal Address:	
Postcode:	
Relationship to you:	

### **Guardian 2**

Title:	
Surname:	
Forenames:	
Full Postal Address:	
Postcode:	
Relationship to you:	

### **Approximate value of your Estate(s)**

<b>ASSETS</b>	<b>Your Assets</b>	<b>Jointly owned assets</b>	<b>Spouse/Civil Partner/Partner's assets</b>
	<b>£</b>	<b>£</b>	<b>£</b>
Home			
Other houses/land/buildings			
Contents/belongings e.g. jewellery etc			
Cash at Bank/Building Society			
Other investments e.g. quoted stocks and shares			

Partnership share			
Sole Business			
Unquoted stocks and shares (e.g. family company shares)			
Money owed to you			
Assets of any sort held outside England and Wales			
Insurance Policies			
Gifts made in last 7 years			
Trust interests (where you are life tenant give capital value of trust fund)			
<b>TOTALS</b>			

<b>Liabilities</b>			
Mortgage and/or other liabilities			

### **Executors**

Your Executors will administer your Estate after you die. They will be responsible for the legal formalities and will collect in your assets and distribute them according to your Will. Your Executors will also act as Trustees if you pass away while any beneficiaries are underage. We recommend that Two executors are appointed, but you can name up to four executors in your Will. On first death however, if you are making mirror Wills and leaving everything to the other, unless there is a reason not, to it makes sense to make the survivor the sole Executor/Executrix.

On first death I wish to appoint the survivor of us as sole Executor/Executrix

If I am not making mirror Wills or on the death of both of us I wish to appoint (tick the applicable box):

- O'Neill Patient Solicitors LLP as professional Executors (our standard administration of Estate charges at the date of your death will apply) as my sole Executor.
- O'Neill Patient Solicitors LLP as professional Executors (our standard administration of Estate charges at the date of your death will apply) to act jointly a named friend or relative (or a non professional Executor as named below).
- Other non professional executors (e.g. friend or relative) – please complete their details below:

#### **Executor 1**

Title:

Surname:

Forenames:

Full Postal Address:

Postcode:

Relationship to you:

**Executor 2**

Title:	
Surname:	
Forenames:	
Full Postal Address:	
Postcode:	
Relationship to you:	

**Executor 3**

Title:	
Surname:	
Forenames:	
Full Postal Address:	
Postcode:	
Relationship to you:	

**Executor 4**

Title:	
Surname:	
Forenames:	
Full Postal Address:	
Postcode:	
Relationship to you:	

**Vesting Age**

The normal rule is that if one of the beneficiaries named in the following sections is a child when you die then their gift will be held on trust by your Executors until they reach the age of 18.

It is usually sensible to vary this rule so that the beneficiary inherits at a later age. If the gift is likely to be substantial, then we recommend the age of 21 or 25. This means if they are applying for an educational grant after leaving school the inheritance will not affect it.

We will prepare your Will so that your Executors have the discretion to advance money early if it is needed by the child for their maintenance, education or benefit.

I would like any underage beneficiaries to inherit at the age of \_\_\_\_\_.

**Gifts**

Would you like to make any gifts of money or items (e.g. £1,000.00 to my godson..., my gold watch to my sister....)?

Yes (please provide details overleaf)

No

Your Executors will make these gifts once they have settled any debts and paid your funeral and administration expenses

Item/Amount of Money	Name	Address	Relationship to you

If any of the people named above die before me I would like their gift to:

- Pass to their children in equal shares
- Pass to someone else or a charity (please provide details in the additional information section)
- Be dealt with as part of my residuary estate (see below).

**Residuary Estate**

Once your executors have paid your debts, funeral and administration expenses and paid any gifts detailed above they will be left with what is known as your 'residuary estate'. How would you like this to be divided?

- 100% to my spouse/civil partner/partner but if he or she dies before me then to the people named below in **equal** shares.
- 100% to my spouse/civil partner/partner but if he or she dies before me then to the people named below in the **percentage** shares stated.
- To the people/charities/organisations named below in the percentage shares stated.

Percentage Share	Name	Address	Relationship to you


If any of the people named above die before me I would like their share to:

- Pass to their children at 18, 21 or 25 years of age in equal shares
- Be split between the rest of the people named above in the shares stated above.
- Pass to someone else or a charity (please provide details in the additional information section)

**Financial Dependents**

Is there anyone who you would consider to be financially dependent upon you who you have not mentioned above? If you are not sure please ring me to discuss this. Failure to deal with this can lead to claims against your estate.

- Yes (provide details in the additional information section)
- No



