**Will and Inheritance Tax**

**questionnaire**

**Date:**

|  |  |
| --- | --- |
| You and your family | |
| 1. Your details | |
| Forenames  Surname  Address    Postcode  Telephone No  Date of Birth  Occupation | |
| **Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:-** | |
| Birth Name | Alias |
| **2. Your Husband/Wife/Partner** | |
| Forenames  Surname  Date of Birth  Occupation | |

**3. Marriage/Partnership Details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| (a) | Year of marriage | |  | |
|  |  | |  |  |
| (b) | Please tick this box if you are not married to your partner | |  | |
|  |  | |  |  |
| (c) | Please tick this box if you are intending to marry/re-marry in the near future | |  | |
|  |  |  | |  |
| (d) | Has either of you been married before? | Yes | | No |
|  |  |  | |  |
| (e) | If you have been married previously has a Decree Absolute of Divorce been granted? | Yes | | No |
|  |  |  | |  |
| (f) | If you have been married previously are you a widow/widower? | Yes | | No |
|  |  |  | |  |
| (g) | If you are a widow/widower when did your spouse die and did he/she leave his entire estate to you? | Yes | | No |
|  |  |  | |  |
| (h) | If there was a Will do you have a copy of the Will and a copy of any Grant of Representation (Probate or Letters of Administration) that was obtained at the time? | Yes | | No |
|  |  |  | |  |
| (i) | If your spouse has predeceased you and did not leave their entire estate to you under the terms of the Will what assets did they leave to third parties including children? |  | | |

4. Your children (including your children from a previous marriage or relationship - full names, dates of birth and address if different from yours

|  |
| --- |
| Name  Date of birth  Address    Name  Date of birth  Address    Name  Date of birth  Address    Name  Date of birth  Address |

5. Children of your husband/wife/partner's previous marriages or relationships - full names, dates of birth and address if different from yours

|  |
| --- |
| Name  Date of birth  Address    Name  Date of birth  Address    Name  Date of birth  Address |

**Please note:**

\*Illegitimate and adopted children (but not step-children) generally have the same rights of inheritance as other children.

\* Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

### Your home and other assets

**6. Your home**

(a) Is your home:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | (a) owned: | | | | | | |
|  |  | (i) in your name alone? | Yes |  | No |  |
|  |  |  |  |  |  |  |
|  |  | (ii) in joint names with your husband/wife/partner? | Yes |  | No |  |
|  |  |  |  |  |  |  |
|  |  | (iii) in the name of your husband/wife/partner alone? | Yes |  | No |  |
|  |  |  |  |  |  |  |
|  | (b) rented? | | Yes |  | No |  |
|  |  | |  |  |  |  |
|  | (c) other - eg provided by a relative? | | Yes |  | No |  |
|  | Estimated value of your home | |  | £ |  |  |

**7. If your answer was (c) please give more details**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | | | | | | | |
| **8. Do you have a business?** | | | | | | | | | |
|  |  | Yes |  | No |  |  |  |  |  |
|  | | | | | | | | | |
| If yes, please provide details: | | | | | | | | | |
| **Company**  Company Name Trade of company No. & Class of shares Estimated value  (if know)    **Partnership**  Partnership Name Trade of business % of ownership Estimated value  (if know)  …………………………………………………………………………………………………………………………………………………………………………………  **Sole Trade**  Trading Name Trade of business | | | | | | | | | |
|  | | | | | | | | | |
| **9. Your main assets** | | | | | | | | | |
| Please list your main UK assets below and give approximate values: | | | | | | | | | |
| Property (incl full address, ownership details, estimated value & details of any mortgages)    Cash      Investments (those not detailed in section 8 above; incl ownership & estimated value)    Cars/vehicles (include estimated value)      Chattels and other valuables (for example expensive Jewellery, hobby/collectable items etc)    Any other assets | | | | | | | | | |

**10. Do you own any assets abroad?**

If yes, please give details:

|  |
| --- |
| **Asset type Value Location**  .......................................... ................................ .............................................................  .......................................... ................................ .............................................................  .......................................... ................................ .............................................................  .......................................... ................................ ............................................................. |

### Funeral, executors, guardians

**11. Funeral**

You may specify in your Will if you wish to be:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| buried? |  | cremated? |  | no preference? |  |

**12. Executors**

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

List below up to four chosen executors:

|  |
| --- |
| Name  Date of birth  Address    Name  Date of birth  Address    Name  Date of birth  Address    Name  Date of birth  Address |

Would you like Haines Watts Trustee Services to act as your executor?

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | Yes |  | No |  |  |  |  |  |

**13. Guardians**

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

|  |
| --- |
| (a) Name  Date of birth  Address      (b) Name  Date of birth  Address |

**14. Beneficiaries**

The main part of your estate is called "the residue". (This is dealt with at question 18.) Before giving away the residue, you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

**15. Cash gifts**

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

|  |
| --- |
| (a) Name Age  Date of birth  Address    (b) Name Age  Date of birth  Address    (c) Name Age  Date of birth  Address    (d) Name Age  Date of birth  Address |

**16. Gifts of articles**

Please give the names and addresses of people to whom you wish to leave specific items and a full description of the article to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will **not** be given the substituted item or the cash equivalent.

|  |
| --- |
| (a) Name  Date of birth  Address    Article  (b) Name  Date of birth  Address    Article  (c) Name  Date of birth  Address    Article |
| (d) Name  Date of birth  Address    Article |

**17. The residue**

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. if there are gifts to your children, we may suggest a provision that if any of them dies before you leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these, tick the appropriate box; if not, please go to question 19.

|  |  |  |
| --- | --- | --- |
| (a) | Everything to my husband/wife/partner, named at question 2 above, outright but if he/she has died then to my children, named at question 4 above, equally; |  |
|  |  |  |
| (b) | Everything to my children, named at question 4 above, equally and any other children of mine; |  |
|  |  |  |
|  | You may choose the age at which your children will receive their entitlement. Insert choice from 18, 21 or 25 years in this box: |  |
|  |  |  |
| (c) | To my husband/wife/partner, named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named in the box below. If not in equal shares then show the share each is to take. | |

|  |
| --- |
|  |

**18. If none of the above choices is appropriate**

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares.

|  |
| --- |
| (a) Name  Date of birth  Address    Share:  (b) Name  Date of birth  Address    Share:  (c) Name  Date of birth  Address    Share:  (d) Name  Date of birth  Address    Share: |

Who is to benefit if the recipient dies before you?

|  |
| --- |
| (a) Name  Date of birth  Address    Share:  (b) Name  Date of birth  Address    Share:  (c) Name  Date of birth  Address    Share:  (d) Name  Date of birth  Address    Share: |

**19. Any other information**

Please use this section to provide additional information, or where there is insufficient information in the sections above:

|  |
| --- |
|  |

**Haines Watts Darlington**

Sterling House  
22 St Cuthbert's Way  
Darlington  
DL1 1GB   
  
Tel: 01325 254700

**Haines Watts Newcastle**

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NE1 IRN   
  
Tel: 0191 2699960