

## Wills and Probate Your Will Questionnaire

Completing this questionnaire will help us to assess your requirements and expedite production of your will.

### Your details

First Name \_\_\_\_\_

Surname \_\_\_\_\_

Address \_\_\_\_\_

Town \_\_\_\_\_

County \_\_\_\_\_

Postcode \_\_\_\_\_

Telephone (daytime) \_\_\_\_\_

Telephone (evenings) \_\_\_\_\_

Have you been married previously? Yes / No \_\_\_\_\_

Are you: Separated  Divorced  \_\_\_\_\_

Do you intend to marry in the near future? Yes / No \_\_\_\_\_

### If Will is to be written in joint names

First Name \_\_\_\_\_

Surname \_\_\_\_\_

Husband / Wife / Partner / Other \_\_\_\_\_

### About your children/step children

First Name(s)	Surname	Date of Birth

### About your assets

Summarise your assets listing everything of value – home, savings, life insurance etc.  
(If they exceed £312,000 for the year ended 5th April 2009, Inheritance Tax may be payable)

Item	£	Item	£
Item	£	Item	£
Item	£	Item	£
Item	£	Item	£
Item	£	Item	£

Do you own any foreign property? Yes / No \_\_\_\_\_

## Wills and Probate Your Will Questionnaire

Do you own a business? Yes / No

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Type of business

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Nature of the business

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Does a (partnership) agreement exist? Yes / No

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### About your executors

These are the people who ensure that the terms of the Will are carried out. It is wise to choose at least two executors. The Members of Atkins Thomson will be happy to act as your executors.

#### 1st Executor

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First Name(s)

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Surname

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Address

---

Town

---

County

---

Postcode

---

Relationship to you

---

#### 2nd Executor

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First Name(s)

---

Surname

---

Address

---

Town

---

County

---

Postcode

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Relationship to you

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### Guardians of your children

Tell us about anyone you would like to act as guardians of your children. This is usually a couple who you would like your children to live with if both parents died.

First Name(s)

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Surname

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### Other information

Please provide us with any other information that you may feel we need to know when advising you on your Will.

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## Wills and Probate Your Will Questionnaire

### About any special requests

List any wishes regarding burial/cremation/leaving your body for medical research etc.  
It is advisable to discuss such wishes with members of your family

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### Do you have any other specific/pecuniary legacies to be mentioned in the Will?

For instance, do you wish to make any gifts to charities or godchildren etc?

First Name(s)	First Name(s)
Surname	Surname
Address	Address
Town	Town
County	County
Postcode	Postcode
Inheriting age (if a child)	Inheriting age (if a child)
Their relationship to you	Their relationship to you
Details / £	Details / £

First Name(s)	First Name(s)
Surname	Surname
Address	Address
Town	Town
County	County
Postcode	Postcode
Inheriting age (if a child)	Inheriting age (if a child)
Their relationship to you	Their relationship to you
Details / £	Details / £

## Wills and Probate Your Will Questionnaire

### Who would you like to leave your assets and possessions to?

If you are leaving anything to children please state the age at which they will inherit e.g. 21, 25 etc.

First Name(s) _____	First Name(s) _____
Surname _____	Surname _____
Address _____	Address _____
Town _____	Town _____
County _____	County _____
Postcode _____	Postcode _____
Inheriting age (if a child) _____	Inheriting age (if a child) _____
Their relationship to you _____	Their relationship to you _____
Details / £ _____	Details / £ _____

First Name(s) _____	First Name(s) _____
Surname _____	Surname _____
Address _____	Address _____
Town _____	Town _____
County _____	County _____
Postcode _____	Postcode _____
Inheriting age (if a child) _____	Inheriting age (if a child) _____
Their relationship to you _____	Their relationship to you _____
Details / £ _____	Details / £ _____

Do you require a Lasting Power of Attorney? Yes / No  
\_\_\_\_\_