

mansouri&son



s o l i c i t o r s

Last Will and Testament

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Questionnaire

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Your Last Will and Testament Questionnaire

1. Your Details

Your Full Name:

Your Address:

Your Number:

Your E-Mail:

Your Nationality:

Your Date of Birth:

Your Country of Birth:

Your Marital Status:

Your Occupation:

Do You Already Have A Will In The UK Or Abroad? Yes No

If Yes, Where Is The Original Held?

2. Your Family's Details

Do You Have A Partner? Yes No

If Yes, What Is Their Name?

If Yes, What Is Their Nationality?

If Yes, What Is Their Address?

If You Have A Partner, Please Tick One: Co-Habiting
 Civil Partnership
 Judicially Separated
 Married

N.B. Please Note That If You Get Married Your Existing Will Becomes Ineffective Unless Reference To The Marriage Is Included In The Will.

Do You Have Dependant Children (under 18)? Yes
 No

If Yes, What Is Their Name(s)?

If Yes, What Is Their Address?

If Yes, What Is Their Date of Birth?

Are Any Of Your Children Adopted?

Are You Including Any Adopted Children In This Will?

Is There Any Other Information About You Or Your Children We Should Know About?

3. Your Assets

Are You Making Mirror Wills? Yes
 No

What Is The Approximate Value Of Your Assets (Combined With Those Of Your Partner/Civil Partner/Spouse If Applicable, e.g. In The Case Of Mirror Wills)?

- Up to £300,000 | £300,001 to £600,000 | £600,001 to £850,000
 £850,000 to £1,000,000 | Over £1 Million

Do You Own Assets Abroad? Yes
 No

Have You Ever Lived Abroad? Yes
 No

Do You Intend To Move Abroad? Yes
 No

4. Your Property & Money

| | Nature of Asset | In Your Name <small>(Approximate Values)</small> | Partner's Name <small>(Approximate Values)</small> | Jointly Owned <small>(Approximate Values)</small> |
|--|-----------------|---|---|--|
| Main Residence (provide address if different to address in Section 1) | | | | |

| | | | | |
|--|--|--|--|--|
| Contents (market value, not insurance value) | | | | |
| Shares | | | | |
| Cash Assets (e.g. Bank and Building Society Acc.'s, National Savings Investments etc.) | | | | |
| Foreign Assets | | | | |
| Other Items Not Listed Above (Art, Jewellery, Cars, etc.) | | | | |
| Other Assets (Business Assets, Agricultural Property, Other Property, etc.) | | | | |
| Life Insurance Policies (incl. Death Benefit) | | | | |

5. Your Liabilities

| | Nature of Liabilities | In Your Name (Approximate Values) | Partner's Name (Approximate Values) | Jointly Owned (Approximate Values) |
|----------|-----------------------|--------------------------------------|--|---------------------------------------|
| Mortgage | | | | |
| Other | | | | |

6. Benefits of Trusts

Are You Or Your Partner/Civil Partner/Spouse A Beneficiary Or Trustee Of A Trust? Yes
 No

Please Provide Details:

7. Lifetime Gifts

Have You Made Any Gifts Of Money Or Other Assets Totalling More Than £3,000 Each Year In The Last 7 Years? Yes
 No

Please Provide Details:



8. Your Executors

Executor A

Executor B

Name:

Name:

Address:

Address:

Relationship To You And Your Partner:

Relationship To You And Your Partner:

Would You Like The Firm To Act As
Your Executors?

- Yes
 No

9. Your Funeral Wishes

Would You Prefer To Be Cremated Or
Buried?

Do You Have Any Specific Requests In
Relation To Cremation Or Burial?

Would You Like To Donate Any Of Your
Organs?

10. Guardians For Your Children

Guardian A

Guardian B

Name:

Name:

Address:

Address:

Relationship To You And Your Partner:

Relationship To You And Your Partner:

11. Your Estate – Gifts

Do You Wish To Leave Specific Items,
Property, Or Cash To Certain
Beneficiaries? Yes
 No

If So, Please Provide Details Below:

Name Of Beneficiary: Age:

Please Describe Item Or
State The Amount Of Cash:

Name Of Beneficiary: Age:

Please Describe Item Or
State The Amount Of Cash:

Name Of Beneficiary: Age:

Please Describe Item Or
State The Amount Of Cash:

You Can Include A Clause In Your Will That Asks Your Executors To Refer To A Letter Of Wishes Left By You In Which You Make Gifts Of Specific Items Of Your Household Furniture, Personal Effects, And Jewellery (Your Chattels) But Not Money. This Letter Can Be Amended As Often As You Like Without Incurring The Expense Of Changing Your Will. Please Note That Your Wishes Would Not Be Legally Binding, However.

Would You Like To Do This? Yes
 No

12. Your Estate – Residue

N.B. The residue is what is left over when your debts, taxes, administration costs, and legacies of money have been paid and any specific items given.

Do You Wish To Leave Your Entire Residue To Your Partner/Civil Partner/ Spouse? Yes
 No

If So, Outright? Or With Limited Access To Capital? Outright
 Other:

On The Death Of Your Surviving Partner/Civil Partner/Spouse, Do You Wish To Divide Your Residue Between Your Children In Equal Shares? Yes
 No

If So, On Reaching The Age Of: 18 21 35 Other: No Specific Age

If A Child Passes Away Before You, Do You Wish Their Children To Inherit Their Share? Yes
 No

Otherwise, Who Would You Like To Benefit And In What Proportion:

12. Your Estate – Residue

Please Give Details Below Of Any Family Members Or Other People Who Are Financially Dependent On You But Who You Are Not Including In Your Will:

Name:

Reason:

Note:

If you lose the capacity to deal with your finances or health affairs, your family or close friends will not be able to deal with matters for you without making an expensive and time-consuming Court application. To prevent this, you can sign a Lasting Power of Attorney (or, LPA) to appoint someone you trust to deal with your property and affairs and/or welfare and healthcare decisions.

We would be happy to assist you with this should you wish to proceed.

Next Steps:

Please return this form when completed to Mansouri & Son Solicitors at:

Mansouri & Son Solicitors

193 Merton Road
Putney
London
SW18 5EF

Or by e-mail to: info@solicitorsfirm.com

If you have a specific contact at the Firm, please send this form to them in the usual manner.