



Making a Will Information Questionnaire

Completing the questionnaire

Fill in this questionnaire using a black ball-point pen and write clearly in CAPITAL LETTERS. Where asked, please mark the relevant box with a clear tick.

This form consists of three sections.

Please return the Information Questionnaire in the reply envelope provided.

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For office use only

Probate Estate Name _____

Client Ref _____

Do You Need a Will?

ARE YOU MARRIED?

When your partner dies, if their assets exceed £5,000, although you may inherit, there is still a Probate application to be made.

Without a Will this procedure can be very long, delays of two years are commonplace.

Arguments often ensue as children may have a right to part of the estate.

HAVE YOU ANY CHILDREN UNDER 18?

Unless you appoint a guardian for your children, Social Services and the Courts will have to decide who will take charge of your children for you. Unmarried fathers do not necessarily have automatic guardianship rights.

ARE YOU AND YOUR PARTNER UNMARRIED?

When one of you dies, property and investments not in joint names will go to the deceased person's children or, if none, to their family. When there is no Will, the surviving partner gets nothing.

HAVE YOU ANY CHILDREN FROM A PREVIOUS RELATIONSHIP?

Once you and your partner have both died, your assets will pass to the children or family of whichever of you died second, leaving the other person's children or family with nothing.

HAVE YOU EVER THOUGHT WHAT WOULD HAPPEN IF YOU WENT INTO CARE?

A carefully worded Will can ensure your children don't lose out in the event that you or your partner go into care.

HAVE YOU EVER CONSIDERED WHAT WOULD HAPPEN IF YOUR SPOUSE/PARTNER REMARRIED AFTER YOU DIED?

A Will can ensure your children don't lose out in the event that your partner gets remarried.

HAVE YOU ANY PROPERTY, SAVINGS OR POLICIES NOT IN JOINT NAMES?

When a person dies, their assets may be frozen until the administration of their estate is sorted out, often taking months and possibly causing hardship for those left behind.

WOULD YOU LIKE TO....

SAFEGUARD YOUR FAMILY'S OR PARTNERS FUTURE?

Making a Will means that what you own goes to those you care most about and not whom the law has chosen. You'll know you've done all you can to safeguard your family's future.

LEAVE SOMETHING TO A GRANDCHILD, NEPHEW, FRIEND OR CHARITY?

A Will is a wonderful way to remember someone and to be remembered by someone. In addition, you can leave a lasting legacy so that the work of your favourite charity can go on.

AVOID ANY ARGUMENT, EXPENSE OR DELAY?

Where there is no Will the average delay in dealing with an estate is two years. With a Will the average is only six-months. A well thought out and legally drafted Will could avoid argument in the family as well as saving considerable time, inconvenience and legal expense.

If you answered *yes* to any question you simply need a Will

Making a Will - Information Questionnaire

PART 1 - Personal Details

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	You	Your partner
Title (Mr, Mrs, Ms etc.)		
Full Name <i>(include middle names)</i>		
Maiden name, alias or professional name: Are there any assets in this name?		
Address		
Date of birth		
Email address		
Contact numbers	Home:	Home:
	Mobile:	Mobile:
	Work:	Work:
Occupation		
Current relationship status	Single ☐ Married ☐ Civil Partnership ☐ Widowed ☐ Separated ☐ Divorced ☐ Cohabiting ☐	
Date of marriage/divorce Start of Cohabitation		
Date of death and name of Spouse/Partner		
Your children from this relationship	1	
<i>(Please include details of all children and state full names, dates of birth and address where not the same as yours)</i>	2	
	3	
Do you have any children from other relationships?	Yes ☐ No ☐	Yes ☐ No ☐
<i>(Please include details of all children and state full names and dates of birth and address where not the same as yours)</i>	1	1
	2	2
	3	3

	You	Your partner
Grandchildren <i>(Please include details of all Grandchildren and state full names, dates of birth and addresses)</i>		
Have you been married before?	Yes ☐ No ☐	Yes ☐ No ☐
	Date of Divorce	Date of Divorce
Is there a spouse or ex-spouse who has not remarried, a child or child of the family, anyone who is financially dependent on you or cohabitee of 2 years who you do not wish to provide for in your Will? <i>(This includes dependent adults, state full name, address etc.)</i>	Address:	Address:
	Relationship to you:	Relationship to you:
Do you suffer from any illness or disability that might impact on your capacity to make a Will? <i>(If yes, please complete this section)</i>	Yes ☐ No ☐	Yes ☐ No ☐
	Special requirements:	Special requirements:
	GP or Consultant details:	GP or Consultant details:
Do you suffer from any disability that would make reading or signing your Will difficult?	Yes ☐ No ☐	Yes ☐ No ☐
	Special requirements:	Special requirements:
Existing Wills <i>(Include details of whereabouts and please supply a copy)</i>	Yes ☐ No ☐	Yes ☐ No ☐
	Details:	Details:
IWC to store new Will?	Yes ☐ No ☐	Yes ☐ No ☐
	(This is a free service and includes a free probate pack and advice for your Executors)	
If no, please state where your Will will be stored		
Do you wish to be buried or cremated?	Buried ☐ Cremated ☐	Buried ☐ Cremated ☐
	Organ donation ☐	Organ donation ☐

Both of you		
Whom do you wish to appoint as Executors? <i>(You must appoint Executors to administer your estate and carry out your instructions in your Will. Being an Executor is time-consuming and onerous. You can appoint your spouse on their own; otherwise, otherwise it is wise to have at least two, especially if children are named as beneficiaries. We will be pleased to act as your Executors, either alone or with a family member or friend.</i> <i>Please state full names, addresses and relationship to you. If you each wish to appoint different Executors we can discuss this and the implications of it).</i>	IWC Estate Planning & Management as Executors Yes ☐ No ☐	
	Name:	
	Address:	
	Relationship:	
Whom do you wish to appoint as guardians and substitute for minor children? <i>(Please note that if you are not married to the child's other parent, they may not automatically have parental responsibility)</i>	Name:	
	Address:	
	Email:	
	Telephone:	
	Relationship to you:	
	Substitute	
	Name:	
	Address:	
	Email:	
	Telephone:	
Relationship to you:		
You	Your partner	
Do you want to make gifts of specific things or sums of money? <i>(Please give details of the gift and the full name and address of the beneficiary. Alternatively, please tick the box if you would like a reference in the Will and a separate list that can be updated as necessary with a letter of wishes.)</i>	Separate List ☐ Gift and beneficiary details:	Separate List ☐ Gift and beneficiary details:

	You	Your partner
Charitable legacies <i>(Please include registered address and Charity number)</i>	Charity name: Charity number: Address:	Charity name: Charity number: Address:
The Residual Estate - Do you want your partner to inherit the whole estate (subject to the gifts specified?) If No, whom do you wish to inherit? <i>(Please give full names, addresses and relationship to you of any beneficiary not already mentioned in this questionnaire)</i>	Yes ☐ No ☐ Name: Address: Relationship:	Yes ☐ No ☐ Name: Relationship:
Any child will inherit at the age of 18 or complete as required	Yes ☐ No ☐ 21 ☐ 25 ☐ Other	Yes ☐ No ☐ 21 ☐ 25 ☐ Other
Other requirements such as life interests in property or trusts; Disabled Discretionary Trusts, Discretionary Trusts. <i>(Trusts are likely to require a detailed discussion)</i>	Details of other requirements:	Details of other requirements:
Do you have any foreign property or assets? <i>(If yes, please supply details and copy of foreign Will)</i>	Yes ☐ No ☐ Details:	Yes ☐ No ☐ Details:
Have you made any gifts in the last 14 years (if over £3,000 in any one tax year?) <i>(If yes, please supply details)</i>	Yes ☐ No ☐ Gift details:	Yes ☐ No ☐ Gift details:
Are you a British Citizen, have you always lived in England or Wales and do you intend to remain here?	Yes ☐ No ☐	Yes ☐ No ☐
Would you like to receive information on Lasting Power of Attorney's?	Yes ☐ No ☐	Yes ☐ No ☐

(If you do not have an LPA in place and later become mentally incapacitated, relatives may face long delays and expense in applying to the court of protection to get access and take control of your assets and finances)

	Sole ownership	Joint ownership	Please provide brief details describing assets	Market value
Assets				
Home	☐	☐		
Other properties or land	☐	☐		
	☐	☐		
Savings	☐	☐		
	☐	☐		
Shares and other investments	☐	☐		
	☐	☐		
	☐	☐		
Life policies/Death in Service	☐	☐		
	☐	☐		
	☐	☐		
Pensions	☐	☐		
	☐	☐		
Businesses	☐	☐		
	☐	☐		
(Detailed discussion required)	☐	☐		
Other assets	☐	☐		
	☐	☐		
	☐	☐		
Liabilities				
Home mortgage/s	☐	☐		
	☐	☐		
Bank Loans	☐	☐		
Overdraft/Credit Card Debts	☐	☐		
Total Liabilities				
Net Estate (IWC to complete)				

Please sign and date

Signature

Signature

Print Name

Print Name

Date

Date