

GARNER & HANCOCK LLP WILLS QUESTIONNAIRE

1. <i>PERSONAL INFORMATION</i>	
1.1 Full Name	
Postal Address & E-mail Address	
Tel No (Home) (Office)	
Date & Place of Birth	
Family Status Date and place of marriage or civil partnership	
Residence for tax purposes Nationality Domicile	

1.2 Partner's full name					
Date of Birth					
Place of birth					
Residence for tax purposes Nationality Domicile					
1.3 Children of your relationship	<table border="1"> <thead> <tr> <th data-bbox="777 705 1175 737">Full Name(s)</th> <th data-bbox="1175 705 1494 737">Date(s) of birth</th> </tr> </thead> <tbody> <tr> <td data-bbox="777 737 1175 1262"></td> <td data-bbox="1175 737 1494 1262"></td> </tr> </tbody> </table>	Full Name(s)	Date(s) of birth		
Full Name(s)	Date(s) of birth				
1.4 Children of a former relationship, Any other dependants					

<p>And/or former spouse or civil partner</p>	
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2. ASSETS					
2.1 Land and Buildings	<table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 30%;">Value</th> </tr> </thead> <tbody> <tr> <td style="height: 150px;"></td> <td></td> </tr> </tbody> </table>	Description	Value		
Description	Value				
Is this held jointly with your partner or any other person, and if so, as joint tenants or tenants in common?					
If no mortgage where are the deeds?					
If subject to a mortgage, please give details					
Is a life policy assigned to a mortgagee					

You Partner You Partner You Partner

<p>2.2 Cash</p>		
<p>2.3 Investments</p>		
<p>2.4 Very valuable items (other than ordinary household or personal effects - e.g. furniture, paintings, cars, boats)</p>		
<p>2.5 Foreign Assets 2.5.1 Cash/Investments 2.5.2 Land and Buildings In which country/state are they?</p>		
<p>2.6 Do you have any life insurance? Are they written in trust?</p>		

2.7 Do you have any pension policies? Are the death benefits written in trust		
2.8 Is any death in service benefit payable by your employer? Have you nominated them on your death?		
2.9 Are you the beneficiary of any trusts?		

2.10 Do you expect to inherit anything substantial		
2.11 Do you have any sizeable debts Have you made any sizeable loans		

You Partner You Partner You Partner

3. FURTHER QUESTIONS		
3.1 Have you made any Wills before, in England or elsewhere? If so please supply a copy		
3.2 Have you made any gifts of more than £3000 in the last seven years?		
3.3 Have you made an Lasting Power of Attorney, also known as a Enduring power of attorney?		
3.3. Have you made a "living Will"		

4. CONTENTS OF WILL		
4.1 Who do you want to be your Executors? <i>(Executors are responsible for administering your estate and seeing that your Will is adhered to. Beneficiaries can also be Executors)</i>		
4.2 Do you have any particular wishes as to 4.2.1 Burial or cremation 4.2.2. Use of your body for medical purposes		

4.3 Who do you want to be guardians of your underage children?		
4.4 Are there any cash sums you want to leave to Charities or relatives, Godchildren or friends?		
4.5 Are there any personal items (e.g. furniture jewellery etc) you want to pass specifically?		
4.6 Who do you want the balance of your estate to pass to?		
4.7 In the event of these beneficiaries not surviving you who would you want your estate to pass to?		

5. <i>INCOME</i>		
5.1 Salary		
5.2 Employer / Nature of business		

5.3 Details of Investment income		
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6. <i>BANKERS AND ADVISERS</i>		
Bankers		
Accountants		
Pensions Advisers		

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PLEASE EMAIL TO
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