

Will Questionnaire

Completed By:

Date:

PERSONAL DETAILS		
	Client 1	Client 2
Title:		
Surname:		
First Name(s):		
Address:		
Gender:		
Telephone No:		
Email Address:		
Date of Birth:		
Occupation:		
Relationship Status:		
Nationality:		
NIN:		
Name of Spouse/Partner:		
Their Nationality:		
First Language:		
Easily able to write and read English in this font?		
Health condition or disability which we should be aware of?		
Have you been divorced previously? If so, do you have any financial obligation to them?		
Have you been widowed previously? If so, please provide name and date of		

death. Was probate obtained?		
Plans to marry in the near future? When? To who?		
Existing Will? If so, where is it? Do you have a copy?		
How did you hear about Garner & Hancock?		
CHILDREN		
Child 1	Full name:	
	Date of birth:	
	Address:	
	Status:	
	Age to inherit:	18 / 21 / 25
	Children's full name, address, and date of birth:	
Child 2	Full name:	
	Date of birth:	
	Address:	
	Status:	
	Age to inherit:	18 / 21 / 25
	Children's full name, address, and date of birth:	
Child 3	Full name:	
	Date of birth:	
	Address:	

	Status:	
	Age to inherit:	18 / 21 / 25
	Children's full name, address, and date of birth:	
Child 4	Full name:	
	Date of birth:	
	Address:	
	Status:	
	Age to inherit:	18 / 21 / 25
	Children's full name, address, and date of birth:	
Any estranged children / step children? Please tell us as they can claim against your estate.		
OTHER RELEVANT FAMILY INFORMATION: (E.g. if any children are step-children or adopted, any other dependents etc.)		
FINANCIAL INFORMATION		
ASSETS		

	Client 1 (£)	Client 2 (£)	Jointly Held (£)
House 1			
House 2			
Car(s)			
Cash (savings in banks or building societies)			
Stocks and Shares			
Pension/Insurance Policy (Nomination made?)			
National Savings Investments			
Other investments			
Household contents			
Jewellery			
Business assets			
Money owed to you			
Potential inheritance			
Any other assets			
Which of your accounts are held online?			
Do you have any cloud-based assets?			
Do you have any crypto currency?			
Do you store any pictures or other items of value online? What arrangements exist for accessing them after your death?			
Total Assets			
LIABILITIES			
Mortgage 1			
Mortgage 2			

Credit card			
Bank overdraft			
Hire purchase agreement			
Money owed to others			
Any other debts			
Total Liabilities			
NET ESTATE - total assets less total liabilities			
INCOME			
Any other relevant information?			
Have you made any gifts over £3,000 per annum in the last 7 years?			
Have you made any gift at any time where you still retain a benefit? (for example, given away a holiday home which you continue to use)			
APPOINTMENT OF GUARDIAN FOR ANY MINOR CHILDREN			
Guardian 1 - Full name			
Address			
Relationship to you			
Guardian 2 - Full name			
Address			
Relationship to you			
EXECUTORS - It is advisable to appoint at least two executors if minor beneficiaries are to inherit under your Will. You may also appoint the partners of Garner & Hancock as your Executors. The first executor would normally be a spouse or partner if you have one.			
Executor 1 – Full name			
Address			
Relationship to you			
Occupation			
Executor 2 – Full name			
Address			

Relationship to you		
Occupation		
Executor 3 – Full name		
Address		
Relationship to you		
Occupation		
Executor 4 – Full name		
Address		
Relationship to you		
Occupation		
LEGACIES - Item and/or money		
Beneficiary 1	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Amount of money / description of item	
Beneficiary 2	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Amount of money / description of item	
Beneficiary 3	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Amount of money / description of item	
Beneficiary 4	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Amount of money / description of item	
RESIDUE - The remainder of your estate after payment of liabilities, expenses and legacies		
Spouse or civil partner to inherit the residue?		Y / N
Share of spouse or civil partner's inheritance?		100% Lesser share:

If lesser share, who is inheriting the remainder?		
On second death, is residue to be divided between children or grandchildren?		Y / N
Proportions?		
If any child predeceases you, what happens to their share of the residue?		Divided between your remaining children or divided between the predeceased child's children? Other?
If no spouse or children, who will inherit the residue?		
Beneficiary 1	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Share to inherit (%)	
Beneficiary 2	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Share to inherit (%)	
Beneficiary 3	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Share to inherit (%)	
Beneficiary 4	Full name	
	Relationship to you	
	Age to inherit (if applicable)	18 / 21 / 25
	Share to inherit (%)	
If a residuary beneficiary predeceases you, do their children inherit their share?		Y / N
FUNERAL ARRANGEMENTS		
Burial / Cremation		
Other Requirements?		

WILL STORAGE & REGISTRATION

Would you like to store your Will at our office free of charge?

Y / N

Y / N

Not being able to find a Will causes untold distress and potential financial loss for your families. 'Certainty' National Will Register has been purposely built to eradicate the real possibility of a Will being lost, destroyed, or stolen.

Please use this space to add any additional information or enquiries.