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**will questionnaire**

**Please complete this form as fully as possible, (in block capitals if handwritten), to enable us to prepare your Will promptly.**

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| **YOUR DETAILS:** | | | | |
| Forename(s): |  | | Surname: |  |
| Name by which you are more commonly known: |  | | Date of Birth: |  |
| Place of Birth: |  | | Number of years resident in England: |  |
| Nationality: |  | | | |
| Is England your permanent home? |  | | | |
| Have you ever lived abroad? If so, where and for how long? |  | | | |
| Address:  Postcode: |  | | | |
| Tel No. Home: |  | Mobile No.:  (Mandatory) | |  |
| Email: |  | | | |
| Marital Status (tick all that apply): | Separated  Divorced  Married  Widowed  Other (please specify)  …………………………………  Single | | | |
| Date of current Will (if any, and including any wills made in another country): |  | | | |
| Location of Will (if any): |  | | | |

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| **YOUR SPOUSE OR PARTNER (if appropriate):** | | | |
| Forename(s): |  | Surname: |  |
| Name by which they are more commonly known: |  | Date of Birth: |  |
| Address:  Postcode: |  | | |
| Relationship to you: | *NB Marriage or entering into a civil partnership will automatically revoke your Will unless it is drafted to take account of your intended marriage or civil partnership. If you and your partner are not married or in a legal civil partnership, please state whether you intend to marry or enter into a legal civil partnership in the future.* | | |

**Do you have a former spouse/civil partner who has not remarried? If so, please confirm if a final order was made excluding the right to make a claim on one another’s estate:**

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| **CHILDREN:** | | | |
| **If any of your children are your step-children or adopted children please detail below. Please also include details of any deceased children.** | | | |
| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |
| Would you consider your child vulnerable? If yes, please provide details. |  | | |
| Do they have any children? Please provide names and ages. |  | | |

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| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |
| Would you consider your child vulnerable? If yes, please provide details. |  | | |
| Do they have any children? Please provide names and ages. |  | | |

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| --- | --- | --- | --- |
| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |
| Would you consider your child vulnerable? If yes, please provide details. |  | | |
| Do they have any children? Please provide names and ages. |  | | |

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| --- | --- | --- | --- |
| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |
| Would you consider your child vulnerable? If yes, please provide details. |  | | |
| Do they have any children? Please provide names and ages. |  | | |

**YOUR ASSETS IN ENGLAND**

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| **YOUR MAIN HOME/PROPERTY:** | | | |
| **Please list any freehold or leasehold property which you own and whether it is held in your sole name, or if in joint names. If the property is in joint names, you may be restricted in dealing with the property after your death.** | | | |
| Address of Property:  Postcode: |  | | |
| Freehold/Leasehold: |  | Approx. Value: | £ |
| Mortgage outstanding: | £ | | |
| Sole/Joint names: |  | | |
| If owned jointly, please provide details of co-owner and whether you hold the property as joint tenants or tenants in common: |  | | |

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| Address of Property:  Postcode: |  | | |
| Freehold/Leasehold: |  | Approx. Value: | £ |
| Mortgage outstanding: | £ | | |
| Sole/Joint names: |  | | |
| If owned jointly, please provide details of co-owner and whether you hold the property as joint tenants or tenants in common: |  | | |

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| **VALUE OF ESTATE IN UK:** | | |
| The approximate value of your estate in the UK: | | £ |
| **My estate is made up of the following assets:- Approx. value:** | | |
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| **OTHER ASSETS AND LIABILITIES:** | | |
| Do you have a business? If yes, please state name and type of business. Is it a company / partnership / in your sole name? | |  |
| Do you have any life assurance policies? If so, is it written in trust for a nominated beneficiary? | |  |
| Are you a beneficiary of a trust? | |  |
| Do you have a pension (other than state pension)? | |  |
| Do you have any digital assets (e.g. social media accounts, online banks, bitcoin etc)? | |  |
| Do you have any liabilities (e.g. credit cards, loans – detail mortgages above under ‘your home’)? | |  |
| **VALUE OF ESTATE OUTSIDE THE UK:** | | |
| The approximate value of your estate outside the UK: | | £ |
| **My estate outside the UK is made up of the following assets:- Approx. value:** | | |
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| **YOUR FOREIGN PROPERTY (if appropriate):** | | | |
| Address of Property:  Postcode: |  | | |
| Freehold/Leasehold: |  | Approx. Value: | £ |
| Mortgage outstanding: | £ | | |
| Sole/Joint names: |  | | |
| If owned jointly, please provide details: |  | | |

*(Please continue on separate page if necessary)*

**YOUR will instructions**

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| **FUNERAL WISHES:** | |
| **You may wish to specify a preference in your will, but please note that you should make your wishes known to your family, and not simply rely on what is in your will.** | |
| I would prefer to be buried at: |  |
| I would prefer to be cremated at: |  |

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| **EXECUTORS:** | | | |
| **Please state full names and addresses of your Executors (it is wise to have at least two and you may appoint your spouse or partner as one). You should name other Executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your Executors, either alone or with a member of your family or friend.** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **CO-EXECUTOR/REPLACEMENT EXECUTOR (delete as appropriate):** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **CO-EXECUTOR/REPLACEMENT EXECUTOR (delete as appropriate):** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **CO-EXECUTOR/REPLACEMENT EXECUTOR (delete as appropriate):** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **GUARDIANS:** | | | |
| **If you have children under the age of 18, you should appoint a Guardian, particularly if you are their sole parent. Guardianship involves a lot of responsibility and you should ask people to ask to act before appointing them. Please note that the appointment of a Guardian will only come into effect on the death of the surviving parent.** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **JOINT GUARDIAN:** | | | |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

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| **GIFTS:** | | | |
| **The bulk of you estate is called "the residue". Before giving away the residue you may wish to make gifts of specific items or sums of money to named individuals or charities.** | | | |
| **PERSONAL POSSESSIONS:**  **You can choose to leave your personal possessions in one of three ways (please tick an option):**  **No specific gifts and all items to fall into the ‘residue’ of your estate and split between the residuary beneficiaries.**  **Specific gifts detailed in your Will (please list below).**  **Left to your executor(s) to distribute in accordance with any letter of wishes you may make during your lifetime.** | | | |
| **Please list below any specific gifts of money or personal possessions which you wish to leave.** | | | |
| Gift: |  | Name of Beneficiary: |  |
| Address:  Postcode: |  | | |
| Age of beneficiary if under 18: |  | Relationship to you: |  |

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| Gift: |  | Name of Beneficiary: |  |
| Address:  Postcode: |  | | |
| Age of beneficiary if under 18: |  | Relationship to you: |  |

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| --- | --- | --- | --- |
| Gift: |  | Name of Beneficiary: |  |
| Address:  Postcode: |  | | |
| Age of beneficiary if under 18: |  | Relationship to you: |  |

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| --- | --- | --- | --- |
| Gift: |  | Name of Beneficiary: |  |
| Address:  Postcode: |  | | |
| Age of beneficiary if under 18: |  | Relationship to you: |  |

*(Please continue on separate page if necessary)*

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| **RESIDUARY ESTATE:** | | | | | |
| **This is the rest of your estate after any specific gifts as above have been made. Please state to whom you wish to leave the rest of your estate (and if more than one person, please state shares).** | | | | | |
| Forename(s): |  | | Surname: |  | |
| Address:  Postcode: |  | | | | |
| Age of beneficiary: |  | Relationship to you: | | |  |
| Proportion of share of residue: |  | | | | |
| If this beneficiary should die before you, is their share to be split equally between any children they may have? If not please specify who should receive their share. |  | | | | |

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| Forename(s): |  | | Surname: |  | |
| Address:  Postcode: |  | | | | |
| Age of beneficiary: |  | Relationship to you: | | |  |
| Proportion of share of residue: |  | | | | |
| If this beneficiary should die before you, is there share to be split equally between any children they may have? If not please specify who should receive their share. |  | | | | |

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| --- | --- | --- | --- |
| Forename(s): |  | Surname: |  |
| Address:  Postcode: |  | | |
| Age of beneficiary: |  | Relationship to you: |  |
| Proportion of share of residue: |  | | |
| If this beneficiary should die before you, is there share to be split equally between any children they may have? If not please specify who should receive their share. |  | | |

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| **Substitute beneficiary(ies) – You may want to consider who is to receive your residuary estate in the event of all of above named beneficiaries die before you. If you would like to include such a clause, please set out their details below.** | | | |
| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |

**Please note that children born outside of marriage and civil partnership, adopted children, and children by an earlier marriage or civil partnership have the same rights of inheritance and will be included if your Will leaves your residuary estate to "my children". If you wish to exclude certain children, it is preferable to name specifically those whom you wish to benefit.**

**Is there any spouse, child or person financially dependent upon you who would expect to be included in your Will, whom you have not named? If so, please give details of that person's name and address and a brief reason why you are not making provision for that person in your Will. In certain circumstances they may have a right to claim a share of your estate.**

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| --- | --- | --- | --- |
| Forename(s): |  | Surname: |  |
| Date of Birth: |  | Age: |  |
| Address:  Postcode: |  | | |
| Relationship to you: |  | | |
| Reason for not making provision in your Will: |  | | |

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| **INHERITANCE TAX:** | |
| Will your estate be more or less than £325,000 (including the value of your house/flat, less any mortgage)? |  |
| Do you require any advice about Inheritance Tax? |  |

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| **MISCELLANEOUS INFORMATION:** | |
| Do you wish Osbornes Solicitors LLP to retain your Will for safekeeping in their fireproof safe (at no charge)? |  |
| How did you hear about Osbornes Solicitors LLP? |  |
| Do you have Lasting Powers of Attorney in place? |  |

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| **ADDITIONAL INFORMATION:** |
| **Please list below any further information you think may be relevant or helpful in drafting your Will.** |
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