

## WILL-U-WAIT WILLS QUESTIONNAIRE



Please read these notes carefully before completing the questionnaire on the following pages

Giving us the information requested overleaf will help us to prepare your Will quickly and accurately. You may not be familiar with some of the terms and words used in your Will. So the following information may help you:-

1. **Testator (male) / Testatrix (female)** - You, the person making the Will.
2. **Estate** - This is the term for the property you own when you die. It includes houses, land, shares, bank and building society accounts, insurance policies, cash, premium bonds and all personal items such as clothes, cars, boats and jewellery. These are collectively known as your assets.
3. **Executor(s)** - The person(s) you select to make sure that your estate is distributed in accordance with your wishes contained in the Will. You can appoint up to four, two is probably best. This can be a member of your family, a friend, or a professional person like someone from Thursfields. An Executor can also be a beneficiary in your Will. Executors must be over 18.
4. **Beneficiary** - A person, or in some cases a class of persons (e.g. all your children/grandchildren) or in some cases a charitable body who benefit under a Will.
5. **Legacy** - An amount of money, a personal item or a share of your assets which you leave to a beneficiary. There are several types of legacies:-
  - 5.1. a specific legacy - personal items such as jewellery, ornaments, furniture, cars, caravans or CD collection
  - 5.2. a pecuniary legacy (somehow called a cash legacy) - a set sum of money left to a beneficiary or a number of beneficiaries
6. **Residue or Residuary Estate** - The residue of your estate is what remains after payment of debts and funeral expenses have been paid and any specific or pecuniary legacies left in your Will have been paid to the relevant beneficiaries.
7. **Guardians** - The person(s) you select to take care of any children you may have who are under 18 when you die. Guardians must be over 18.

WILL-U-WAIT WILLS QUESTIONNAIRE



1. Full names (please include any names you do not like or do not use)?

For you -

For your spouse or civil partner or partner -

2. What is your full address?

3. What is your date of birth?

For you -

For your spouse or civil partner or partner -

4. What are your contact numbers?

Mobile phone -

Daytime -

Evening -

Personal E-mail -

5. Are you married / in a civil partnership?  Yes  No

6. If you are not married are you living with a partner?  Yes  No

7. Do you have any children?  Yes  No.

Does your spouse or partner have any children?  Yes  No

If no, please proceed to *question no 9*.

If yes, please fill in the information below (Please note that if any of your children are from a previous relationship, you may need further legal advice before you make your Will).

Names of your children

Dates of Birth

Addresses if they do not reside with you

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

8. If any of your children are under 18, do you want to appoint a guardian(s) for them in your Will? If so, please fill in the following information regarding the person(s) you would like to appoint as guardian(s).

Full Names of your Guardians

Relationship to you

Addresses

_____	_____	_____
_____	_____	_____
_____	_____	_____

9. If you are married/in a civil partnership/living with your partner, would you like your spouse or civil partner or partner to be your sole Executor?  Yes  No

If you do NOT want your spouse/partner to be your only executor, please fill in the following information regarding the person(s) you wish to be your executors together with your spouse/partner

Full Names of your Executors	Relationship to you	Addresses
_____	_____	_____
_____	_____	_____
_____	_____	_____

10. If you are married/in a civil partnership/living with a partner, do you want to leave all your estate to them if you die before them?  Yes  No

11. If you are not married/in a civil partnership/living with a partner, please give the names and addresses of the persons you would like as your executors stating their relationship to you (Please note that if you do not have any family member or friend whom you would like to choose as your executor, one or more of the partners at Thursfields can be your executor(s) or can act with a family member as a joint executor).

Full Names	Relationship to you	Addresses
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**- LEGACIES -**

12 Do you want to leave any specific legacies?  Yes  No

If you do want to leave specific legacies please fill in the information below.

Full Name of Beneficiary	Address	Details of item(s)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

13. Do you want to leave any pecuniary legacies  Yes  No.

If yes, please fill in the following information.

Full Name of beneficiary	Address	Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**- RESIDUE or RESIDUARY ESTATE-**

14. Do you wish to leave the whole of your Residuary Estate to one person  Yes  No

If yes, please fill in the following information.

Full Name of beneficiary	Address
_____	_____

If no, please give the names addresses of all the beneficiaries. State their relationship to you and say if they are to share your residue equally or some are to receive a larger share than others.

Full name of beneficiary	address	relationship	share
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If one or more of the people referred to in *question no. 14* dies before you, do you want their children to take their share?  Yes  No

If not, do you want the remaining surviving beneficiaries to receive the share of the person who has died before you?  Yes  No

15. If you want to leave any part of your residue to charity, please fill in the following information.

Full name of charity	address	amount/share (e.g. half, quarter, tenth)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

16. Do you wish for your body to be  a) cremated  b) buried  c) no preference?

If you choose a) or b), please give any further details you feel appropriate e.g. name of churchyard, preferred crematorium, details for disposing of your ashes in the space provided below. Please note that it is not necessary to include these details in your Will but you may prefer to do so to assist your executors. If you prefer, you can simply inform your executor(s) of your wishes or write them in your own words and make sure your executor(s) know about this.

- SPACE FOR YOUR NOTES -