

List of information required to complete Web Questionnaire

Please use this tick list to ensure you have the required information prior to completing the questionnaire.

Details of any current Will/Codicil you have

Whether you want your new Will to deal with any foreign assets you have and details of those assets (if applicable)

Your funeral wishes

Details of any funeral or care plans you have

Who you would like to appoint as your Executors. Their full name and address are required.

Names and dates of birth of any children or grandchildren

If you have minor children, anyone you would wish to appoint as a Guardian. Their full name and address are required.

If you have a pet, any important information regarding its health/care after you die

For cash gifts, the persons full name and address is required.

Consider any charities you may wish to give a gift to

For properties you own, please ascertain how the property is held (whether it is in your sole name or jointly owned), the value of the property and who you would like to leave it to. This includes second properties and foreign properties you own.

For any agricultural properties, you will need to confirm how the property is owned, how long it has been owned for and who you would like it to be left to

Consider whether you would like to allow someone to live in your property for a period of time after you have died e.g. allowing your spouse to live in the property until death, when it would then be passed to your child

All business assets you have, including how the asset is owned, the length of ownership and the value

All life assurance policies together with their surrender value

Names and addresses of people you have nominated for pension death benefits

Bank accounts, including savings and current account, including their current value

Details of all shares and investments, including the provider and the current value

If you are the beneficiary of any trusts, details are required together with the value

Details of trusts you have set up, and the value

The value of any likely inheritance you expect to receive from someone else's estate

The value of any loan you have made to a person and the debt outstanding, including their name and address. Consider whether you wish that person to repay the loan after you have died.

Details of any loans you have taken out, for example bank loans or mortgages. If the loan is secured against property, then details of the property will be required. Ensure you have the total amount borrowed, the date the amount is due to be repaid and the terms of the loan.

Debts incurred through credit cards (not including those which you are imminently due to repay)

Consider if you have made any gifts over £3,000.00. Details of the gift value and date given are required. If any inheritance tax is due, please consider if you would like the person to pay the tax or whether it should come from your estate.

Details of any other assets not previously mentioned. Include a brief description and value of the asset.

Consider who you would like to receive your residual estate (what is left after all the specific gifts and funeral expenses etc). This could be a spouse, children or grandchildren.

Are any of your intended beneficiaries considered 'vulnerable'? You must provide details as to why you believe they are vulnerable, e.g. they may be disabled, have addiction problems, cannot manage money etc.

Consider if any of your beneficiaries likely to divorce or become bankrupt in the near future?

Do you wish to provide for any children who are not blood related to you? This could be children from a previous relationship, or step-children in your current relationship. Their name, date of birth and address will be required.

Consider what you would like to happen to a gift if the intended beneficiary dies (or in the case of a charity, dissolves). Details of the substitute are required.

Details of any claims by third parties over any property you own.

Miscellaneous – consider any other unusual circumstances you believe your solicitor should be aware of.

Miscellaneous – consider any specific questions you would like your solicitor to answer.