

Will Questionnaire

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Mirror Wills

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About this questionnaire

Your answers to this questionnaire provide the information required to prepare a pair of Mirror Wills.

Mirror Wills are Wills for married couples, civil partners and cohabiting partners who wish to make almost identical Wills. A pair of Wills is produced, one for each partner, distributing the deceased's estate in the same way in both Wills, usually to the surviving partner. Appointments of executors and, if required, guardians are the same in both Wills. There is the flexibility for individual gifts to be made, for example, each partner could leave his or her jewellery to a different child, and each partner may request different funeral arrangements.

If you and your partner wish your respective estates to be distributed in significantly different ways, you should each complete a separate Single Will Questionnaire downloadable from the Will Quill website.

This Will Questionnaire is only suitable if you are domiciled in England or Wales, are at least eighteen years old, and understand the nature and purpose of making a Will.

How to complete this questionnaire

This questionnaire has been designed to be easy to follow. It is very comprehensive so may appear lengthy but should only take about thirty minutes to complete once you have all the information you require at hand. I recommend that, before completing the questionnaire, you read through it and the guidance notes carefully. This will help you decide what you wish included in your Will.

There are several ways in which you can then complete this questionnaire:

1. You can complete the questionnaire in Adobe Reader, selecting and typing your answers into the spaces provided. You can then either:
 - a) Click the "Email Form" button at the end of the questionnaire which will email the questionnaire to me automatically;
 - b) Save the questionnaire, then send it to me by email as an attachment;
 - c) Print out the questionnaire and post it to me.
2. You can print out the questionnaire and fill it out by hand. You can then either:
 - a) Scan the completed questionnaire and send it to me as an email attachment;
 - b) Post it to me.

Please complete all relevant sections with full and accurate answers – the information you supply is used to draft your Will.

If there is anything you are unsure of, please contact me for help and advice.

What happens next?

This questionnaire provides me with most, if not all, of the information I need to prepare your Will. I will email or telephone you if I need any further information or need to explain and discuss options with you. Once I have all the relevant information, I will send you a fixed price quotation, based upon my published fee structure, for the services you require. On your acceptance of my quotation, I will produce the draft documents for your approval. Payment is not due until you are satisfied with the draft documents. Then I will produce and post to you the final documents printed on heavy-weight paper in a tamper-resistant binding ready for your signature.



Glossary of terms

The use of technical jargon in this questionnaire has been avoided as much as possible. However, there are some terms which are important for you to understand.

Beneficiary	A person, charity or organisation that is to receive something from your Will or from a trust.
Child or children	Your natural children both legitimate and illegitimate from any relationship and any child you have adopted; this term does not include stepchildren.
Estate	Everything you own at your death.
Executor	A person or professional entity appointed to administer your estate and make sure that the wishes expressed in your Will are carried out. Executors are often also appointed as trustees of any trusts that arise from your Will.
Guardian	A person appointed to have parental responsibility for a child under the age of 18 if there is no other surviving person with parental responsibility.
Joint Tenants	Owning your property as beneficial joint tenants means the property belongs to you and the other owner or owners jointly. You must all act together as a single owner, for example on a remortgage or a sale. You do not own specific shares in the property and you cannot give away a share of the property in a Will. If you die, your interest in the property passes automatically to the other owner or owners. See also tenants in common .
Residual Estate / Residue	Everything that remains after all funeral expenses, taxes debts and administration expenses have been paid, and any gifts have been made including any trusts that have been set up.
Tenants in common	Owning property as tenants in common means the property belongs to you jointly but you also own a specific share of its value. You can give away, sell or mortgage your share. If you die, your share of the property passes to the beneficiary in your Will. See also joint tenants .
Testator	The person making a Will.
Trust	A legal arrangement whereby one or more trustees hold and manage assets for the benefit of one or more others (the trust beneficiary or beneficiaries).
Trustee	A person or professional entity appointed to administer a trust .

Mirror Will Questionnaire

About You	Testator 1	Testator 2
Full name including all middle names and title	<input type="text"/>	<input type="text"/>
If you hold any assets in other names, enter those names here	<input type="text"/>	<input type="text"/>
Full postal address including postcode	<input type="text"/>	<input type="text"/>
Contact telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
Date of birth	Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>	Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Do you consider yourself to be permanently resident in England or Wales?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If not, which country do you consider as your permanent residence?	<input type="text"/>	<input type="text"/>
Do you have an existing Will?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, where is it stored?	<input type="text"/>	<input type="text"/>
Please provide brief details of your existing Will and your reasons for wishing to replace it in the Additional Information section.	<input type="text"/>	<input type="text"/>
Is your ability to read, understand and sign your Will is affected by any condition?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please give details	<input type="text"/>	<input type="text"/>

Your Relationship

- Relationship between Testator 1 and Testator 2
- ☐ Married
☐ Civil Partners
☐ Cohabiting lifetime partners

Cohabiting Partners	Testator 1	Testator 2
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Please complete this section if you are cohabiting partners who are not married or in a civil partnership.

What is your individual marital status?

- ☐ Single
☐ Separated
☐ Divorced (decree nisi) or dissolved (conditional order)
☐ Divorced (decree absolute) or dissolved (final order)
☐ Widowed

- ☐ Single
☐ Separated
☐ Divorced (decree nisi) or dissolved (conditional order)
☐ Divorced (decree absolute) or dissolved (final order)
☐ Widowed

Do you intend to marry or enter into a registered civil partnership in the near future?

- ☐ Yes ☐ No

If yes, on what date?

Day Month Year

And are these Wills to be effective before or after that date?

- ☐ Before ☐ After

Your Assets	Testator 1	Testator 2
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Understanding the value of your estate and what type of assets you own is very important in drafting your Will.

Firstly, if you have unusual assets in your Estate like royalties, assets outside England or Wales, or business assets; special provisions may be required in your Will.

Secondly, the size of your estate may have Inheritance Tax implications.

Calculate the net value of your assets by deducting all mortgages, loans and debts from your total assets. Your individual assets are those which you own **solely** in your name plus your share of those you own jointly with persons **other than** your spouse or civil partner.

Combined assets are the sum of the assets that you and your spouse or civil partner own individually plus those assets you and your spouse or civil partner own jointly. Note this does not apply to cohabiting partners.

Some Assets may fall outside your Will: Pension fund trustees usually have discretion to distribute the pension scheme death benefits and your wishes should be notified to the trustees. Similar consideration may apply to death in service schemes. The proceeds of a Life Assurance Policy written in trust are payable to the person named. Jointly owned assets may pass to the surviving owner(s) (except assets held as "Tenants in Common")

Is the net value of your individual assets greater than £325,000?

- ☐ Yes ☐ No

- ☐ Yes ☐ No

If you are married or in a civil partnership, is the net value of your combined assets greater than £650,000?

- ☐ Yes ☐ No

- ☐ Yes ☐ No

Do you own business assets?

- ☐ Yes ☐ No

- ☐ Yes ☐ No

If yes, please provide details

Your Assets	Testator 1	Testator 2
Do you own agricultural assets?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide details	<div></div>	<div></div>
Do you own any intellectual property such as copyrights, trademarks, patents, artistic or literary works?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide details	<div></div>	<div></div>
Are you a beneficiary under an existing trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide details	<div></div>	<div></div>
Do you own your main residence?	<input type="checkbox"/> No <input type="checkbox"/> Yes, owned solely by Testator 1 <input type="checkbox"/> Yes, owned jointly with Testator 2 <input type="checkbox"/> Yes, owned jointly with other(s)	<input type="checkbox"/> No <input type="checkbox"/> Yes, owned solely by Testator 2 <input type="checkbox"/> Yes, owned jointly with Testator 1 <input type="checkbox"/> Yes, owned jointly with other(s)
If you are a joint owner of your main residence, do you hold the property as	<input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenants in Common <input type="checkbox"/> Don't know	<input type="checkbox"/> Joint Tenants <input type="checkbox"/> Tenants in Common <input type="checkbox"/> Don't know
Do you own any other real property (land and buildings) in England or Wales?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, please provide details	<div></div>	<div></div>
Please specify if, in the last 7 years, you have made any gifts of sums of money or property the total value of which exceeded £3,000 in any one tax year.	<div></div>	<div></div>

Your Assets outside England and Wales

Testator 1

Testator 2

Although assets located outside England and Wales can be included in your Will, there is no guarantee that your wishes will be achieved as some countries have different inheritance laws. It is strongly recommended that you write a Will for such assets in the country in which they are situated. However, if you own assets in Scotland or Northern Ireland, your Will under the laws of England or Wales should be sufficient provided that you are domiciled in England or Wales.

Do you own assets outside
England or Wales?

☐ Yes

☐ No

☐ Yes

☐ No

If yes, please provide details
of the assets and country in
which they are located

Have you written a Will for
those assets in the country in
which they are located?

☐ Yes

☐ No

☐ Yes

☐ No

Do you wish to include these
assets in this Will? **Please
read the above note
carefully before answering.**

☐ Yes

☐ No

☐ Yes

☐ No

Your Executors

Your executors are the people you choose to administer your estate in accordance with the provisions of your Will. Any executor you choose must be over 18 years of age. Please check with any person you wish to appoint executor that they are happy to act in this capacity – being an executor is a big responsibility and will require a real commitment.

You must appoint at least one executor. You can appoint a beneficiary to act as an executor. You can, if you wish, appoint your spouse or partner as an executor. If you do, you may also wish to appoint one or two additional executors to share the responsibility or to act if your spouse or partner dies before you do or is otherwise unable or unwilling to act as executor.

Administering an estate can be complex and time consuming. You may wish to appoint a professional executor, such as a firm of solicitors or a trust corporation, to act solely or jointly with your other executors. I recommend SWW Trust Corporation. Please note that professional executors will charge fees against your estate. If you do not appoint a professional service, you should appoint at least two executors.

Whom do you wish to appoint as executors?

☐ My spouse/civil partner as the sole executor

If my spouse/civil partner is unwilling or unable to act,
then I appoint:

☐ SWW Trust Corporation

☐ Others (please give details below)

☐ My spouse/civil partner jointly with:

☐ SWW Trust Corporation

☐ Others (please give details below)

☐ SWW Trust Corporation as the sole executor

☐ Others to act jointly (please give details below)

Executor 1

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law; accountant; friend)

My

Relationship to Testator 2

My

Executor 2

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law; accountant; friend)

My

Relationship to Testator 2

My

Executor 3

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law; accountant; friend)

My

Relationship to Testator 2

My

Executor 4

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law; accountant; friend)

My

Relationship to Testator 2

My

Guardians for Minor Children

Usually the surviving natural parent will look after your children in the event of your death. However, if you have children under the age of 18, you may wish to appoint a person(s) to look after your children in the event that both you and your spouse/partner die. It is worthwhile speaking to your proposed guardians to check that they are happy to act in this capacity before you list them here. Becoming a guardian is a very big commitment that should only be undertaken after consideration.

First or Sole Guardian

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law etc.)

My

Relationship to Testator 2

My

Second joint guardian (if appropriate)

Full name

Address

Relationship to Testator 1
(e.g. brother; sister-in-law etc.)

My

Relationship to Testator 2

My

Home & Asset Protection Trusts

A Home or Asset Protection Trust in a Will may be suitable in the following circumstances:

- Couples concerned about their home having to be sold to pay care home fees for the surviving partner;
- Couples where one or both partners have children from previous relationships and wish to safeguard those children's inheritances;
- Couples who individually wish to ensure the inheritance of their children (or other beneficiaries) without forcing their surviving partner to sell their home;
- Couples with children where the surviving partner may remarry and inadvertently disinherit the children.

A Home Protection Trust works by placing the deceased share of the home into trust whilst giving the surviving partner the right to occupy the property for his or her lifetime. On their death (or other event that you specify such as marriage), the property passes to your ultimate beneficiaries. The trust has flexibility to enable the surviving partner to move geographic location, downsize etc.

An Asset Protection Trust enables you to place your home and/or other assets into trust.

If you wish to place your entire residual estate into trust, please select the Life Interest Trust option in the Your Residual Estate section.

If you feel a Home or Asset Protection Trust would be suitable for your circumstances, please select the appropriate trust to receive further information.

- ☐ Home Protection Trust
☐ Asset Protection Trust

Your Gifts

Before dealing with the residue of your estate, you may wish to leave sums of money or gifts of assets (e.g. jewellery, cars, furniture, property) to specific persons, organisations or charities.

Please note: these gifts are made **before** your residual estate is left to your main beneficiaries. If you are leaving gifts of money, please ensure that there will be sufficient funds in your estate to make these gifts, otherwise assets from your estate (possibly even your home) will have to be sold to raise the funds.

Some Assets may fall outside your Will and cannot be gifted: Pension fund trustees usually have discretion to distribute the pension scheme death benefits and your wishes should be notified to the trustees. Similar consideration may apply to death in service schemes. The proceeds of a Life Assurance Policy written in trust are payable to the person named. Jointly owned assets may pass to the surviving owner(s) (but not assets held as "Tenants in Common" which may be gifted).

When gifting specific items, please provide a full description of the item so that it can be readily identified.

If you wish to make more than six gifts, please continue in the Additional Information section.

If you wish to leave a number of specific items, I suggest that you provide the full details in a separate list. In turn this list will be referred to in your Will. Should you wish to make any changes to the list in the future, you will not have to change your Will. Note: this list must not include monetary gifts.

Trusts

You may wish to leave a gift in trust for one or more beneficiaries. There are many different types of trusts. Listed below are some of the most common trusts. You will also find more detailed information on the Will Quill website. If you are unsure whether a standard trust satisfies your wishes, simply describe what you wish to achieve.

Fixed Trusts, in which the beneficiaries are named and the proportions for how much to pay to each one are clearly stated.

Discretionary Trusts, in which the beneficiaries are named but the Trustees have the power to decide how much to give to each, according to circumstances and guided by a Letter of Wishes stating how you would like the trust to be used.

Life Interest Trusts, in which a beneficiary receives income from capital or the right to occupy a property for their lifetime. On their death (or other event that you specify such as marriage), the capital or property passes to your ultimate beneficiaries. For example, it could hold a second property in trust to provide a home for an elderly or disabled relative for his or her lifetime and then pass to your children.

Disabled Trusts, in which a disabled person is the principal beneficiary of a discretionary trusts with special tax exemptions. This removes the inheritance from being means tested for benefits and protects the inheritance for vulnerable beneficiaries.

Annuity Trusts, in which a beneficiary is provided with an annuity.

Please bear in mind that trusts require administration and are subject to complex taxation rules. It is recommended to appoint one professional trustee such as SWW Trust Corporation.

List of Items	Testator 1		Testator 2	
In your Will, refer to a separate list of specific items and recipients?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Gift 1	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Gift 2	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Gift 3	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Gift 4	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Gift 5	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Gift 6	Testator 1	Testator 2
Full name of person, organisation or charity receiving gift:	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Relationship to you (if applicable)	My <input type="text"/>	My <input type="text"/>
Full description of gift or monetary amount	<input type="text"/>	<input type="text"/>
If this gift is being left to a child, at what age do you wish to receive it?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 <input type="checkbox"/> Other age; please state <input type="text"/>
Gift to be effective	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths	<input type="checkbox"/> On my death <input type="checkbox"/> After both deaths
If the gift is contingent upon some condition, or is to be held in trust, please specify	<input type="text"/>	<input type="text"/>
In the event of the named recipient dying before you, do you wish the gift to child or children they may have?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Your Residual Estate

Your residual estate is everything that remains after all funeral expenses, taxes and debts have been paid, the gifts listed above have been made including any trusts that have been set up.

If you are leaving your residual estate to your children in equal shares either after your spouse or partner has died or directly, you may wish to refer to them as "my child or children" rather than by name to save having to rewrite your Will if your family increases. If you do not wish your children to inherit equal shares or your children are adults or you do not intend to have further children, then you should name them as individual beneficiaries. Note that the term "child or children" refers to your natural children both legitimate and illegitimate from any relationship and any child you have adopted; it does not include stepchildren. Should you wish to include one or more stepchildren, then you should name all your children and stepchildren as beneficiaries.

Trusts

You may wish to leave your residual estate in trust for your beneficiaries.

A Lifetime Interest Trust entitles your spouse or partner to the income from your residual estate and the right to occupy a property for life (unless, if you chose, he or she remarries). This protects the capital for your ultimate beneficiaries and is often preferred when there are children from previous relationships who might otherwise be inadvertently disinherited.

A Discretionary Trust gives your trustees the flexibility to apply the funds over time in accordance with the needs of your beneficiaries guided by a Letter of Wishes stating how you would like the trust to be used.

A Two Year Discretionary Trust is appropriate where a large amount of flexibility is required. It suits the situation where you would rather wait until after the first death and then make a decision as to what to do with your Estate to maximise inheritance tax efficiency.

How do you wish to leave you residual estate?

- ☐ To my spouse or partner but if he or she dies before me, to "my child or children" in equal shares
- ☐ To my spouse or partner but if he or she dies before me, to the beneficiaries listed below
- ☐ As a Life Interest Trust for my spouse/partner and then to the beneficiaries listed below
- ☐ To my "child or children" in equal shares
- ☐ To the beneficiaries listed below
- ☐ As a Discretionary Trust for the beneficiaries listed below
- ☐ As a Two Year Discretionary Trust

Beneficiary 1

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

 %

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Beneficiary 2

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

 %

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Beneficiary 3

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

 %

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Beneficiary 4

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

 %

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Beneficiary 5

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

%

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18

☐ 21

☐ 25

☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes

☐ No

Beneficiary 6

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

%

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18

☐ 21

☐ 25

☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes

☐ No

Substitute Beneficiaries

If all of the beneficiaries and potential beneficiaries of your residual estate die before or at the same time as you, your estate could be partially or wholly intestate and be distributed in accordance with the rules of intestacy. To prevent this, you may wish to name a substitute beneficiary such as a more remote relative or a charity.

If you do not wish to name a substitute beneficiary, leave this section blank.

Substitute Beneficiary 1

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

%

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Substitute Beneficiary 2

Full name of person, organisation or charity receiving gift:

Address

Relationship to Testator 1 (if applicable)

My

Relationship to Testator 2

My

Percentage of residue to be received

%

A child cannot receive a gift until at least 18 years old. If this gift is being left to a child, at what age do you wish to receive it?

☐ 18 ☐ 21 ☐ 25
☐ Other age; please state

If the gift is contingent upon some condition, or is to be held in trust, please specify

In the event of the named recipient dying before you, do you wish the gift to child or children they may have?

☐ Yes ☐ No

Disabled Beneficiaries

If any of your beneficiaries, potential beneficiaries or recipients of gifts have physical or mental disabilities, please give details here.

Depending upon the nature of the disability and the value of the gift, I will advise you whether it is best held in trust.

Exclusions

Please give details of anyone you wish to deliberately exclude from your Will even if you think such person may have a claim on your estate.

The following individuals can make a claim for provision from an estate where reasonable financial provision has not been made for them:

- The husband, wife or civil partner of the deceased
- The former spouse or civil partner of the deceased, but not if they have remarried or entered into a new civil partnership
- A child of the deceased
- Any person treated by the deceased as a child of the family in relation to a marriage or civil partnership to which the deceased was a party
- Any person who lived in the same household as the deceased for the two years up to the death of the deceased as if they were the deceased's husband, wife or civil partner
- Any other person who, immediately before the death of the deceased, was being maintained, either wholly or partly, by the deceased

Your Funeral Wishes	Testator 1		Testator 2	
<p>You may wish to include instructions regarding your funeral in your will. Please be aware that such instructions have no legal effect but it would be hoped that your executors would carry out your wishes. Therefore please ensure that you inform your executors, family and friends of those wishes.</p>				
Donate body for medical research?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Donate organs for transplantation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, do you wish to donate all of your body?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If no, specify which parts of your body you wish to donate	<input type="text"/>		<input type="text"/>	
Burial	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Cremation	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Specific requests for your funeral	<input type="text"/>		<input type="text"/>	

Further Options		
<p>Please indicate if you would like information about the following options:</p>		
Lasting Powers of Attorney Nominating someone to act for you if you are unable to do so yourself.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Advance Decisions (Living Wills) Specify which medical treatments you do/do not wish to receive if you are unable to communicate those wishes yourself.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Secure Document Storage Lifetime storage for your Wills and other important documents.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Pre-paid Funeral Plans	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Additional Information

Please use this section to:

- Describe anything you would like included in your Will that has not been covered by the above questions;
- Overflow your answers to any of the above questions;
- Provide any other information you feel will be helpful in writing your Wills;
- Ask questions and request further information.

Confirmation and Quotation Request	Testator 1	Testator 2
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Have you completed this questionnaire yourself?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If not, please specify:		
The full name of the person who completed this questionnaire	<input type="text"/>	<input type="text"/>
His or her relationship to you	<input type="text"/>	<input type="text"/>
The reason he or she completed it on your behalf	<input type="text"/>	<input type="text"/>
Please confirm	<input type="checkbox"/> I confirm that the information I have provided in this questionnaire is accurate and complete.	<input type="checkbox"/> I confirm that the information I have provided in this questionnaire is accurate and complete.
Date	Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>	

To send your completed Will Questionnaire by email, please click the following button:

Email Form