

PHILIP J MILTON & COMPANY PLC

WILL DRAFTING QUESTIONNAIRE

**Please use pages 5 onwards to provide details of everyone to be named in the Will.
Thank you.**

MIRROR WILLS

| | |
|---|-----------------------------|
| Do you need a pair of ‘mirror’ Wills (these mean ‘identical’ provisions between the two of you according to who might go first)? (If no, we shall be happy to supply a second questionnaire upon request.) | Yes No Not Applicable |
|---|-----------------------------|

MARRIAGE / CIVIL PARTNERSHIP

(please read “marriage” on this questionnaire to also mean Civil Partnership, “spouse” to also mean Civil Partner and “divorce” to also mean dissolution or annulment)

As a Will can be partially or wholly invalidated by marriage or divorce, it is important that we know the following:

| | |
|---|-----------------------------|
| Are you married? | Yes No |
| If yes, what was the date of your marriage? | |
| Do you want your Will to still apply in the event of a forthcoming marriage? | Yes No Not Applicable |
| If yes, please provide the name and address of your intended spouse as Client 2 on page 5. | |
| Are you currently separated but want your Will to still have effect? (a divorce will not invalidate the whole Will but only the parts where your spouse is named as an executor or beneficiary) | Yes No |
| Have you been widowed previously? This may have Inheritance Tax implications for your Estate. If you would like further guidance, please forward a copy of the closing Estate summary and Will (unless we assisted with Probate.) | Yes No Not Applicable |
| If yes, when did your late spouse die? | |

If you need consideration in the Will to address a former spouse’s claim on your Estate, please contact us to discuss further. The dates of the marriage and divorce, details of any court order and the contact details of the Solicitor representing you would be required. It is recommended that a copy of these details is stored with the Will in case of challenge.

FUNERAL

- You should share your wishes with your immediate family as well and not just rely on what is in your Will.
- If you wish to leave any part of your body for transplant purposes, you should inform your family and your doctor and carry a donor card.
- If you wish to leave your body for medical research and education purposes, you must arrange this in advance. Please contact the medical school to which you wish to donate your body and request the appropriate forms.

| | |
|--|--|
| Do you have a preference for your funeral? | burial cremation no preference other (please elaborate) |
| Do you wish to leave detailed directions for your funeral? | You can do this in a separate Letter of Wishes. You can write this in your own words or we can assist if required. |

EXECUTORS

| | |
|--|--|
| If a couple, do you wish to appoint each other as Executors? | Yes No Not Applicable |
| Do you wish to appoint a representative of Philip J Milton & Company Plc as Executor? We recommend this for impartiality and professional guidance at the time, even if jointly with a family member(s) | Yes, when either of us dies Yes, but only when Client 1 dies Yes, but only when Client 2 dies Yes, when the second one of us dies No |

Please provide details on pages 6 onwards of any other Executors you wish to appoint. A maximum of four Executors should be appointed. Executors can also be beneficiaries.

GUARDIANS

If you have children you may want to appoint one or two people as guardian(s) for them. Usually, the appointment will only apply if you and the child's other parent have both died. The position may be different if you are a single parent. Guardianship involves much responsibility and you should discuss the matter with your chosen guardian(s) to confirm they agree to the appointment.

TRUSTS

You may wish to protect part of your estate by putting it or parts of it into Trust, for a variety of reasons, including:

- If you wish to protect some of the value of your home from being taken to pay for care costs
- If you wish to mitigate Inheritance Tax
- If you have children from previous relationships and wish to keep the wealth of the two families segregated, in part or total, even if you want your partner to enjoy its benefit meantime
- If one of your adult beneficiaries is unable to understand financial arrangements, is unreliable with money or bankrupt (or could be in serious financial difficulties)
- If one of your beneficiaries could divorce in the foreseeable future or is in a relationship with an untrustworthy partner
- If you want to provide a benefit to someone for a limited time (eg their lifetime) and you then want to direct what happens to the capital or perhaps a property after that time

Please speak to us if you think a Trust could be appropriate for your Will.

LEGACIES

You can leave capital in several ways:

- A specific item (chattel)
- the contents of a bank account or the value of an investment
- a specific amount of money
- a share of your residual estate (what remains after costs, tax and the above bequests)

Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.

Children excluded from your Will may have a right to claim a share of your Estate in certain circumstances. Please ask for advice, if appropriate.

Do you want any children to inherit at 18? If you stipulate over 18, the bequest may result in the inadvertent creation of a series of Trusts on your death, with administrative, cost and tax burdens. Please do speak to us about these implications if they are relevant for you.

If your wishes do not “fit in the boxes” below we shall be happy to discuss your requirements to structure your Will effectively. Please use this form to provide any information that you can.

Please continue on a blank page if more space is needed.

YOUR HOME

| | |
|--|---|
| Is your home: | Owned Rented Other (eg living with parents) |
| If you own your home, in whose name is it held? | |
| If you own your home jointly, is it held: | As Joint Tenants As Tenants in Common Not known |
| If Tenants in Common, do you know your Title Number? | |

JOINT ASSETS

Most joint assets (eg property, investments, bank accounts) pass automatically to the surviving owner on first death without ever forming part of your Estate. The main exception is when property is owned as Tenants in Common, in which case your Will can leave your share to someone else.

Do you have any other jointly owned assets which you specifically would not want to pass to the co-owner? If yes, please give details below. You may need to prepare a 'Declaration of Severance' for this to happen.

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Please continue on a blank page if more space is needed.

ASSETS ABROAD

If you own assets abroad you should also seek advice from a Firm with expertise in Will writing in the country where the assets are located to establish if a separate Will to these assets is required. Have you already made arrangements in this respect?

Please give details of assets owned abroad:

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| |

Please continue on a blank page if more space is needed.

ONCE THE WILL IS COMPLETE

| | |
|--|--|
| Where would you like to sign your Will? | At home At the office of Philip J Milton & Company Plc |
| Where would you like your Will to be stored? | At home In the strongroom of Philip J Milton & Company Plc Elsewhere |
| How many copies of your Will do you require? | |

PEOPLE TO BE NAMED IN YOUR WILL

| | |
|--|-----------|
| Client 1 | |
| Full Name | |
| Address | |
| Are you UK resident? | Yes No |
| Do you have dual nationality? If so please provide details: | Yes No |

| | |
|---|-----------|
| Client 2 | |
| Full Name | |
| Address (if given above you do not need to repeat it in full here) | |
| Relationship to Client 1 | |
| Are you UK resident? | Yes No |
| Do you have dual nationality? If so please provide details: | Yes No |

Executor / Guardian / Beneficiary (please delete as applicable)

Full name

Address

(if given above you do not need to repeat it in full here)

Relationship to you

Date of birth (if under 18)

If an executor, when should they be appointed?

When either of us dies
Only when the second one of us dies
Only when dies

What should they inherit on the first of your deaths?

What should they inherit on the second of your deaths?

If this person dies before you, who should receive their legacy?

their children
their spouse / partner (full name)
someone else (please give details)

Executor / Guardian / Beneficiary (please delete as applicable)

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