

PHILIP J MILTON & COMPANY PLC

WILL DRAFTING QUESTIONNAIRE

As far as possible please complete all the sections that are relevant to you. Thank you.

Client 1

Full Name _____

Address _____

Are you UK resident? Yes
 No

Do you have dual nationality? Yes
 If so please provide details: No

Client 2

Full Name _____

Address
 (if different to Client 1) _____

Relationship to client 1 _____

Are you UK resident? Yes
 No

Do you have dual nationality? Yes
 If so please provide details: No

Do you need a pair of 'mirror' Wills (these mean

'identical' provisions between the two of you according to Yes
who might go first)? No

(If no, a second questionnaire may be required and we Not Applicable
 shall be happy to supply this upon request.)

MARRIAGE/PARTNERSHIP

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

Are you married or in a civil partnership?	Yes No
Do you want your Will to still apply in the event of a forthcoming marriage or civil partnership?	Yes No/Not Applicable
Are you currently separated but want your Will to still have effect?	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 you need consideration in the Will to address a former spouse or civil partner's claim on your Estate, please contact us to discuss further. 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

Please note:

- 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?	If so, 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 of any other Executors you wish to appoint. Please note that a maximum of four Executors should be appointed.

Executors can also be beneficiaries. Please provide details of all bequests on pages 7 onwards.

Full name	_____
Address	_____ _____ _____
Relationship to you	_____
When should they be appointed as an executor?	When either of us dies Only when Client 1 dies Only when Client 2 dies Only when the second one of us dies

Full name	_____
Address	_____ _____ _____
Relationship to you	_____
When should they be appointed as an executor?	When either of us dies Only when Client 1 dies Only when Client 2 dies Only when the second one of us dies

Executors, continued

Full name	
Address	
Relationship to you	
When should they be appointed as an executor?	When either of us dies Only when Client 1 dies Only when Client 2 dies Only when the second one of us dies

Full name	
Address	
Relationship to you	
When should they be appointed as an executor?	When either of us dies Only when Client 1 dies Only when Client 2 dies Only when the second one of us dies

GUARDIANS (if addresses have already been given you do not need to repeat them here)

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.

Full name	
Address	
Date of birth	
Relationship to you	

Full name	
Address	
Date of birth	
Relationship to you	

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 by the Local Authority 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 about this 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 provide any information that you choose on this form.

If you need more space please use the “additional notes” section at the end of this questionnaire.

BENEFICIARIES (if addresses have already been given you do not need to repeat them here)

Full name	_____
Address	_____ _____ _____
Date of birth (if under 18)	_____
Relationship to you	_____
What should they inherit on the first of your deaths, if anything?	_____
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 under "additional notes")

Full name	_____
Address	_____ _____ _____
Date of birth (if under 18)	_____
Relationship to you	_____
What should they inherit on the first of your deaths, if anything?	_____
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 under "additional notes")

Beneficiaries, continued (if address has already been provided you do not need to repeat it here)

Full name	
Address	
Date of birth (if under 18)	
Relationship to you	
What should they inherit on the first of your deaths, if anything?	
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 under "additional notes")

Full name	
Address	
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Beneficiaries, continued (if address has already been provided you do not need to repeat it here)

Full name	_____
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YOUR HOME

Is your home:	Owned Rented Other (eg living with parents)
If you own your home, in whose names 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 the 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 joint assets which you specifically would not want to pass to the co-owner? If yes, please give details. You may need to prepare a ‘Declaration of Severance’ for this to happen.

If you need more space please use the “additional notes” section at the end of this questionnaire.

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:

If you need more space please use the “additional notes” section at the end of this questionnaire.

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?	

Thank you for completing the questionnaire. We shall now provide a draft for you to consider, also raising any further questions that may need attention before finalising your instructions. Please note that our invoice is typically supplied with the first draft of the Will.

Additional Notes:

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Additional Notes:

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