



## MARRIAGE / PARTNERSHIP

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

Are you married or in a civil partnership?	Yes No
Do you intend your Will to still have effect in the event of a forthcoming marriage or civil partnership?	Yes No
Are you currently separated but intending your Will to still have effect?	Yes No
Have you been widowed previously? This may have Inheritance Tax implications for your own Estate. If you would like further guidance, please forward a copy of the closing Estate summary and Will (unless this Firm assisted in the Probate.)	Yes No

If you require a recital 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 that represented 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 make these wishes known to your immediate family as well and not 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 will need to 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 about your funeral?	burial cremation no preference
Do you wish to leave detailed directions regarding 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

Do you wish to appoint each other as Executors of your Wills?	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)	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.

Any Executor can also be a beneficiary. Please provide details of any bequests to them 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 address has already been provided you do not need to repeat it here)

If you have children under 18 you may want to appoint one or two people to act 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 a great deal of responsibility and you should discuss the matter with your chosen guardian(s) to confirm that they agree to act before appointing them.

Full name	
Address	
Date of birth	
Relationship to you	

Full name	
Address	
Date of birth	
Relationship to you	

## **TRUSTS**

You may wish protect part of your estate by putting 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 a previous relationship and wish to keep the wealth of the two families discrete
- If one of your adult beneficiaries is unable to understand financial arrangements, unreliable with money or bankrupt
- If one of your beneficiaries is likely to divorce in the foreseeable future or is in a relationship with a partner you do not trust
- 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 any remaining funds or property after that time

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

## **LEGACIES**

You can bequeath:

- 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 benefitting under your Will may have a right to claim a share of your Estate in certain circumstances. Please ask for advice, if appropriate.

Do you wish your minor beneficiaries to inherit at 18? If you stipulate an age over 18, the bequest may result in a series of Trusts following your death which will carry both administrative 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 so that we can 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 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?	_____
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?	_____
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?	_____
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)	_____
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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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Full name	_____
Address	_____ _____ _____
Date of birth (if under 18)	_____
Relationship to you	_____
What should they inherit on the first of your deaths?	_____
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## 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 Unknown
If Tenants in Common, do you know your Title Number?	

## JOINT ASSETS

Most jointly owned assets (eg property, investments, bank accounts) revert automatically to the surviving owner on first death. The main exception to this 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 jointly owned 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 signed by both parties to enable 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 seek advice from a Firm with expertise in Will writing in the country that the assets are located to establish if a separate Will to cover your overseas assets may be required. Have you already made arrangements in this respect?

Please give details of assets owned abroad:


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