

©Sharma & Co Solicitors

Will Questionnaire

- 1 Full name:
- 2 Address:
- 3 Burial or cremation?
- 4 Full name of spouse:
- 5 Names and ages of children of present marriage:
 - (a):
 - (b):
 - (c):
 - (d):
- 6 Have you or your spouse been married before?
- 7 If the answer to 6 is yes, set out the names and ages of any children of your previous marriage(s):

Self

- (a):
- (b):
- (c):

Spouse

- (a):
- (b):
- (c):

- 8 Names and addresses of proposed executors:

First executor

- Full name:
Address:
Postcode:

Second executor

- Full name:
Address:
Postcode:

- 9 Name and address of guardians (only relevant if there are infant children):
- First guardian**
- Full name:
- Address:
- Postcode:
- Second guardian**
- Full name:
- Address:
- Postcode:
- 10 Pecuniary legacies: amount, full name and address of each legatee:
- (a):
- (b):
- (c):
- (d):
- 11 Specific legacies of property: identify the property and give the full name and address of each legatee:
- (a):
- (b):
- (c):
- (d):
- 12 Beneficiaries of the rest of the estate (residue):
- 13 Substitute beneficiaries of residue:
- 14 At what age do you wish the beneficiaries to inherit the residue?
- 15 Who shall receive the residue should the beneficiaries die before you?
- 16 Complete the following schedules to help your solicitor assess the inheritance tax position:
- 17 Have you made any gifts of any kind in the last 7 years? if so please provide full details.
- 18 Do you have Lasting Powers of Attorney in place?

Assets	You (£ value)	Spouse (£ Value)	Tick if Jointly owned
Houses (UK)			
Houses (outside UK)			
Contents of Houses			
Cars, Boats Aircraft			
Jewellery			
Cash (name banks with balances)			
Paintings			
Antiques			
Quoted Shares			

Partnership or other business interest			
ISAs,			
Unquoted Shares in Private Limited Company			
Liabilities			
Mortgages			
Loans			
Credit Cards			
Other Value			
Other Liability			

Life Insurance Company	Policy number	Sum assured	Premiums	Purpose of policy	Whether or not in trust

Pension Scheme or policy	Amount of death benefit	Widow's or widower's pension	Is death benefit in trust?	Nomination form completed