



## WILL QUESTIONNAIRE AND CHECK LIST

We look forward to meeting you to discuss your Will and any tax planning enquiries you have. The attached form is in two parts:

### 1. PERSONAL INFORMATION

It would be helpful (but it is not necessary) if you would complete this part and bring it with you to the meeting or email, fax or post it to us in advance of the meeting.

### 2. NOTES

We find that these notes are useful reminders of matters which may affect your decisions on what to put in your Will. We recommend that you read through these before we meet. We will be glad to deal with any queries or questions you have at the meeting.

If you wish please visit our web-site where we have further information and leaflets which may be of assistance to you. Our web-site address is [www.srb.co.uk](http://www.srb.co.uk).

**All information will be treated in the strictest confidence.**

Thank you.

## PART 1 – PERSONAL INFORMATION

<b>YOUR PERSONAL DETAILS</b>		
	<b>You</b>	<b>Your Partner (if applicable)</b>
Full Name: Mr/Mrs/Miss/Ms/Other		
Are you known by any other name?		
Address including post code		
Is your permanent home in England or Wales? If not, please state which country.		
Where do you consider your country of domicile to be?		
Date of birth		
Occupation		
Telephone number: Day Evening Mobile Email address		
Marital Status: (please tick) Single Married or planning to marry Civil Partnership Separated Divorced Widowed		
Have you been married before?		
Do you have any children from a previous relationship?		
Have you made an Enduring Power of Attorney or Lasting Power of Attorney?		

**ASSETS**

Please try to complete as much of this as you can. It will be useful if you wish to discuss Inheritance Tax Planning. Estate Valuation will assist in Estate Planning.

Assets	Value in your sole name	Value in your partner's sole name	Value jointly owned
Family Home			
Other Properties			
Personal Effects Including: Cars/Boats			
Life Policies			
Pension/death in Service lump sum			
ISAs, TESSAs, PEPs/ Shares/Unit Trusts/Bonds			
Value of business assets			
Bank/Building Society/National Savings/Premium Bonds			
Other assets			
Interest in a Trust			
Potential Inheritance			
Property and other assets owned overseas			
Gifts made of over £3,000 in any tax year			
Loans made which are repayable to your estate			
<u>Liabilities:</u> Mortgage outstanding:  Credit Cards  Other			

**INFORMATION ABOUT YOUR CHILDREN (IF ANY)****At what age would you like your children to inherit?****18/21/25**

If you chose an age over 18 we will explain the additional tax which may be payable if you die before the children reach the age you stipulate.

<b>Name</b>	<b>Address</b>	<b>Date of Birth</b>

**INFORMATION ABOUT YOUR GRANDCHILDREN (IF ANY)****At what age would you like your grandchildren to inherit?****18/21/25**

<b>Name</b>	<b>Address</b>	<b>Date of Birth</b>

**DETAILS OF ANY FINANCIAL DEPENDANTS (E.G. AGED PARENT OR STEP-CHILDREN) or anyone who may expect to inherit under your will other than those mentioned above**

If there is anyone who may have a claim on your estate that you wish to exclude from your Will, please provide full name and address. It is sensible to include a letter with your Will explaining why you wish to exclude this person.

Name	Address	Date of Birth

**APPOINTMENT OF EXECUTORS**

Executors are persons whom you appoint in your Will to carry out your wishes and administer your estate. This is a responsible position with some duties imposed by law.

- You may appoint a beneficiary as Executor
- You may appoint your Spouse as Executor and/or your children
- You may appoint Stone Rowe Brewer to act with or without a relative or friend of yours. We have a Trust Corporation called **The SRB Trustee Company Limited** which is non-profit making, authorised by the Solicitors Regulation Authority and covered by our Professional Indemnity Insurance. This corporation is available to act as Executor / Trustee or Attorney for our clients.
- If you appoint a friend or relative who is your age or older, consider appointing someone else if your friend or relative dies before you
- Please see our leaflet "Guide for Personal Representatives" which gives more information on the duties involved

**We would advise you to appoint two Executors. Please supply full names and addresses.**

<b>If your husband/wife survives you would you wish them to act as Executor</b>	Yes/no
<b>Would you wish to appoint someone else to act with them, if so give details</b>	Name:  Address:   Relationship to you, if any:
<b>First Executor if husband/wife dies before you</b>	<b>Second Executor if husband/wife dies before you</b>
Name:  Address:   Post Code:  Relationship to you, if any:	Name:  Address:   Post Code:  Relationship to you, if any:

**APPOINTMENT OF GUARDIANS (if you have children under 18)**

If you have any children under the age of 18 you should consider appointing at least one Guardian. When one parent dies, the surviving parent usually becomes the legal Guardian but it is of course possible that both parties may die together or you may be a single parent.

If any children or grandchildren are illegitimate, adopted or stepchildren, or if any beneficiary is vulnerable, it is important that you let us know.

Name and Address of Guardian	Relationship to you	Relationship to your Partner

**GIFTS OF PERSONAL ITEMS**

Please give details of any gifts you would like to leave to individuals.

Name and address of recipient	Description of gift

**LEGACIES**

Please give details of any monetary gifts you would like to leave to individuals.

Name and address of recipient	Amount of gift

## RESIDUARY ESTATE

You will need to decide where you want the rest of your estate to go. Most couples will leave everything to each other first and then to their children. If you want to do anything different, please ensure you have full names and addresses of the people you wish to name when we meet.

**Please give details of any gifts you would like to leave to individuals.**

<b>If your husband/wife survives you would you wish to leave residuary Estate to them?</b>	Yes/no
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**If you do not have husband/wife surviving you please give details of who you would like to share your Residuary Estate:**

<b>Name and address of recipient</b>	<b>Percentage Share of Residue or Amount</b>

## ALTERNATIVE BENEFICIARIES

If your main beneficiaries should predecease you, please think about who you would like to inherit your estate e.g. 50% to Uncle John Smith, 25% to Cousin Mary Jones and 25% to Cancer Research.

<b>Name and address of recipient</b>	<b>Percentage Share of Residue or Amount</b>

## FUNERAL WISHES

Please think about your funeral wishes. Do you wish to be buried or cremated? It is not always necessary to include this in your Will, but you may wish to do so. Alternatively we can prepare a side letter setting out your wishes.

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## **PART 2 – NOTES**

### **PREVIOUS WILL**

If you have made a previous Will or Codicil, please let us have a copy if possible or let us have details of it. We need to know this even if the Will related only to foreign assets.

### **DIVORCE OR REMARRIAGE**

Generally divorce treats a former spouse as if he or she had predeceased you so that no gift will pass to them nor can they act as Executors even if named as such. In other respects however, the rest of the Will remains valid.

If you have made a Will and then marry or remarry, the Will will be invalidated and the rules of intestacy will apply. However, a valid Will can be made taking into account a planned marriage or remarriage. If this applies to you, please let us know when we meet.

### **LIFE POLICIES WRITTEN UNDER TRUST/NOMINATIONS**

Please provide details of

- any life policies which may have been written under Trust
- nominations (e.g. for Employer's death-in-service benefits)
- any Trusts in which you have an interest or of which you are a Trustee

NB: Nominations and assets which you have written under Trust, will not pass under the terms of your Will but under the terms of the Nomination or Trust. Also, anything you own jointly with another will pass to the other person by survivorship - not under the terms of your Will. If this is not what you want, we need to know, so that we can change the nature of the way the asset is held. Please ask if you are not clear about this.

### **INHERITANCE TAX**

- There is no Inheritance Tax on gifts between Spouses or Civil Partners
- On all other gifts (except charitable ones) the first £325,000 of the estate is tax-free then tax is applied at 40% on the value of the estate above £325,000
- Tax always comes out of the residuary estate unless the Will says that a gift or legacy should bear its own tax so be careful not to leave too little in the residue for the residuary beneficiary who is usually the most important beneficiary
- When calculating the value of the estate for Inheritance Tax purposes, you must add on the value of all large gifts over £3,000 per annum made by the deceased in the last seven years

### **TRANSFERABLE NIL RATE BAND**

The Transferable Nil Rate Band allows a surviving spouse to bring forward any unused percentage of the Nil Rate Band from the estate of the first spouse to die to set against Inheritance Tax on the estate of the second spouse. If the Nil Rate Band is completely unused by the first spouse, then the estate of the second spouse can double the Nil Rate Band at the date of death of the second spouse. This means in this tax year there could be a maximum Nil Rate Band of £650,000.00.

## COULD A CLAIM BE MADE AGAINST YOUR ESTATE?

The Inheritance (Provision for Family and Dependants) Act 1976 (as amended) allows dependants and others (usually relatives) to make a claim against the estate of a deceased person if they did not make adequate provision for them in the Will.

If you feel that your estate could be at risk from a claim, then we would recommend that a statement is prepared under this Act setting out your reasons for not including this particular person in your Will. This type of statement can be invaluable if a claim is made. If a claim is not made then this statement would not become a public document and could in time be discarded. We would be pleased to advise you if you feel this might be relevant.

### YOU MAY ALSO LIKE TO CONSIDER:

- Funeral arrangements
- Organ donation
- Power of Attorney
- Financial/Investment advice

We would be pleased to advise you on any of the above.

### YOUR NOTES

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