



YOUR WILL
CLIENT QUESTIONNAIRE

Please complete this questionnaire as fully as possible and bring it to your appointment.

PART A – YOU AND YOUR FAMILY

1 You

Title	
Forenames	
Surname	
Address	
Postcode	
Telephone Number	
Mobile Number	
Email	
Date of Birth	
Occupation	
Marital Status (Married, Single, Widowed, Divorced, Co-habiting)	

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so please give details below.

2 Your Husband / Wife / Partner

Forenames	
Surname	
Date of Birth	
Occupation	

3 Marriage / Partnership Details

(a) Year of Marriage		<input type="text"/>
(b) Please tick box if you are not married to your Partner		<input type="checkbox"/>
(c) Please tick box if you are intending to marry / re-marry in the near future		<input type="checkbox"/>
(d) Has either of you been married before?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

4 Your Children (including your children from a previous marriage or relationship) – full names, dates of birth and address if different from yours.

(a) Name	
Date of Birth	
Address	
(b) Name	
Date of Birth	

Address	
(c) Name	
Date of Birth	
Address	
(d) Name	
Date of Birth	
Address	

5 **Children of your Husband / Wife / Partner's previous marriage or relationship** - full names, dates of birth and address (if different from yours).

(a) Name	
Date of Birth	
Address	
(b) Name	
Date of Birth	
Address	
(c) Name	
Date of Birth	

Address	
(d) Name	
Date of Birth	
Address	

Please note:

- *Illegitimate and adopted children (but not step children) generally have the same rights of inheritance as other children.*
- *Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.*

PART B – YOUR HOME AND OTHER ASSETS

6 Your Home – is your home

(a) Owned:			
(i) in your name alone	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
(ii) in joint names with your husband/wife/partner?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
(iii) in the name of your husband/wife/partner alone?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
(b) Rented?	Yes	<input type="checkbox"/>	No <input type="checkbox"/>
(c) Other – e.g. provided by a relative	Yes	<input type="checkbox"/>	No <input type="checkbox"/>

7 If your answer was (c) please give more details

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8 Do you have a Business? Yes No

If Yes – state type of Business	
Is it a (tick box)	Company <input type="checkbox"/> Partnership <input type="checkbox"/> In your sole name <input type="checkbox"/>

9 Your Main Assets

Please list your main assets below and give approximate values.

Description of Asset	Value

10 Joint Assets

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owners(s).

Description of Asset	Joint Owner(s)	Value

Please note: Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will.

11 Do you own any assets abroad? If yes please give details

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PART C – FUNERAL, EXECUTORS, GUARDIANS

12 Funeral

You may specify in your Will if you wish to be :-

Buried Cremated No preference

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 medical purposes tell your family and your doctor and carry a donor card*

13 Executors

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

(a) Name	
Address	
(b) Name	
Address	
(c) Name	

Address	
(d) Name	
Address	

Would you like the Partners from our firm to act as your executors? Yes No

14 Guardians

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will only take effect if you and the child's other parent are both dead. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name	
Address	
(b) Name	
Address	

PART D – BENEFICIARIES

The main part of your estate is called “the residue”. (This is dealt with at question 17). Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as “beneficiaries”.

15 Cash Gifts

Please give the name and address of the beneficiary and amount to be given with the age of anyone who is under 18.

(a) Name	
Address	
Amount	
(b) Name	
Address	
Amount	

16 Gifts of Articles

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or cash equivalent.

(a) Name	
Address	
Article	
(b) Name	

Address	
Article	

17 The Residue

This is all that you own except jointly owned property and the gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 18.

(a) Everything to my husband/wife/partner named at question 2 above, outright, but if he/she has died then to my children, named at question 4 above equally;	
(b) Everything to my children, named at question 4 above, equally and any other children of mine;	
You may choose the age at which your children will receive their entitlement. Insert choice from 18, 21 or 25 years in this box:	
(c) To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named in the box below,. If not in equal shares, then show the share each is to take	
Name of Person / Organisation	Share (if not to be equal shares)

18 **If none of the above choices is appropriate**

(a) Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

Recipient Name	Address	Share

(b) Who is to benefit if the recipient dies before you?

Recipient Name	Address	Share

GENERAL NOTES

Certainty

As part of our Will service we offer free registration with Certainty the National Will Register. This ensures that if for any reason your executors, beneficiaries or family cannot find your Will or forget where the original is stored they can search the Certainty database.

The register does not see or store a copy of your Will nor will it disclose to anyone making a search that a Will exists. Their search enquiry is sent to us and only when we are satisfied that the person searching is your executor or beneficiary and can provide us with a death certificate will we discuss the Will with them.

If you would like to take advantage of this service, please let us know.

Other Points

A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.

On divorce, gifts to your husband/wife are cancelled as is his/her appointment as executor but the remainder of the Will stands. This can create problems and it is better to make a new Will.

If you are not making any provision for a husband/wife/partner, or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.

Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

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