

PEACOCK & CO Solicitors

WILL QUESTIONNAIRE

Peacock & Co
94 High Street, Wimbledon Village, SW19 5EG
Gwynne House, 11 West Street, Epsom, KT18 7RL

YOUR PERSONAL DETAILS	
Mr/Mrs/Ms/Miss/Dr/Other	
Surname	
Forename(s)	
Name by which you are known (if different from above)	
Address	
Any property not located within the UK (please list, including location)	
Home number	
Mobile number	
Email address	
Occupation	
Date of Birth	

MARITAL STATUS	Yes	No	Date
Are you married/in a civil partnership?			
Have you been divorced?			
Are you a widow?			
Have you re-married?			
Do you intend to marry or enter into a civil partnership in the near future?			

CHILDREN		
Name	Age	Date of Birth

OTHER			
	Yes	No	Comment
Do you maintain or give financial help to anyone not to be mentioned in your Will?			
Do you have a current Will? If so, please provide a copy of the same.			
Do you require any special assistance or special facilities (e.g. an interpreter/in relation to mobility)?			
Do you want your Will to cover worldwide assets? (if you have property in another country you may need to make a separate Will for those assets and limit this Will to exclude those assets).			
Do you have a Lasting Power of Attorney? If so, please provide a copy of the same.			

YOUR PARTNER'S DETAILS	
Mr/Mrs/Ms/Miss/Dr/Other	
Surname	
Forename(s)	
Name by which they are known (if different from above)	
Address	
Any property not located within the UK (please list, including location)	
Home number	
Mobile number	
Email address	
Occupation	
Date of Birth	

DOMICILE

Domicile can affect your tax status. If you are not sure we can discuss this in more detail when we meet.

Are you domiciled in the UK?

- Yes
 No

If not, where are you domiciled?

GUARDIANS

If you have young children, please give the details of the individuals you wish to look after them if you die before they reach 18. Please ensure that you obtain the consent of those individuals listed below.

Name of first Guardian

Address

Relationship (if any)

To act solely or jointly?

Name of second Guardian

Address

Relationship (if any)

To act solely or jointly?

Are you acting as a guardian for someone else's children? Yes/No

If yes, you can appoint your successor in your Will. Please give details if this applies to you.

Full name of minor(s) for whom you are a guardian:

Full name of successor guardian(s):

FUNERAL WISHES

Please indicate your funeral wishes:

- Buried
 Cremated
 Other (please specify below)

Please give any other specific wishes/instructions below (e.g. nature of ceremony, music to be played, where the service is to be held, etc.):

EXECUTORS

Please name the people (ideally between two and four) that you would like to carry out the wishes in your Will. You could choose individuals (family/friends) or professionals (your solicitor/accountant). A charity you wish to support may be able to act as your executor.

Please note an Executor can also be a beneficiary under your Will. It is advisable to obtain your Executors' consent. If you only have one or two Executors it is sensible to name a "substitute" also.

Name of first Executor	
Address	
Relationship (if any)	
To act solely or jointly?	

Name of second Executor (or substitute)	
Address	
Relationship (if any)	
To act solely or jointly?	

Name of third Executor (or substitute)	
Address	
Relationship (if any)	
To act solely or jointly?	

Name of fourth Executor (or substitute)	
Address	
Relationship (if any)	
To act solely or jointly?	

PREVIOUS GIFTS

Please indicate whether you have made any gifts of property, money or other substantial items in the past seven years. If so, please provide details of the recipients, values and dates.

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Pets

Would you wish to make any provision for what will happen to your pet after you have died?

- Give your pet to an animal charity together with a donation for its upkeep.
- Give pet to a friend or a family member with a gift to cover its upkeep.
- Instruct executors to euthanise the pet.

It may also be a good idea to leave instructions or helpful information about your pet in a Letter of Wishes to assist your executors and/or the person who will care for the cat.

SPECIFIC GIFTS OF YOUR POSSESSIONS

Please briefly describe any gifts and provide the details of your intended beneficiaries. These are usually free from tax, but please indicate if you consider that tax should be paid by the recipient. Gifts can be made in a variety of ways, for example, by reference to a letter to be read after your death (also known as a 'Letter of Wishes'); or you can state that you wish your beneficiaries to take turns themselves to choose items from your belongings; or that you want all your belongings to go to one, or a number of people in your residuary estate (see below).

The various options have different advantages and disadvantages and so please do contact us if you are unsure whether you would like to leave any specific gifts. You should not let decisions in this regard unduly delay matters.

Item and description	
Full name of recipient	
Address	
Date of Birth (if under 18)	

Item and description	
Full name of recipient	
Address	
Date of Birth (if under 18)	

PECUNIARY LEGACIES (CASH GIFTS)

**Please state any set sums of money you wish to give to individuals or charities.
In the case of a charity, please provide us with the full name, address and charity registration number.**

Amount (in words)	
Full name of recipient (and charity number if applicable)	

Address	
Date of Birth (if under 18)	

Amount (in words)	
Full name of recipient (and charity number if applicable)	
Address	
Date of Birth (if under 18)	

Amount (in words)	
Full name of recipient (and charity number if applicable)	
Address	
Date of Birth (if under 18)	

Amount (in words)	
Full name of recipient (and charity number if applicable)	
Address	
Date of Birth (if under 18)	

RESIDUARY LEGACIES			
<p>The residue of your estate consists of everything else you own. The value is calculated after your funeral costs and expenses (e.g. final utility bills, tax due and the cost of administering your estate) have been paid, and any gifts of money and possessions have been made. When deciding how to allocate your residuary estate, it may help to divide it into percentages (please ensure that any percentages add up to 100%). Please note a share of residue will not be eroded by inflation and therefore may be more valuable than a gift of a fixed amount of money.</p>			
<p>Please select from the following options or provide further details below.</p>	Yes	No	<p>Age at which you want your children or grandchildren to inherit (e.g. 18/21/25). Please note that if you do not specify an age, the default age of 18 may apply.</p>

Everything to my spouse/partner, but if they have died, then to my children equally (or to my grandchildren if my children predecease me)			
Everything to my children equally (or to my grandchildren if they predecease me)			
Everything to my spouse/partner, but if they have died then to the following beneficiaries:			
Other (please specify below)			

Full name	
Percentage share	
Address	

Full name	
Percentage share	
Address	

Full name	
Percentage share	
Address	

Full name	
Percentage share	
Address	

If any of the individuals named above die before you, or the named charities cease to exist, please state what you would like to happen to the gift they would have received (e.g. would you like it to be passed to their children, or distributed amongst your remaining beneficiaries).

REVERSIONARY LEGACIES (where you have a TRUST)

These are gifts you want people to have in trust for the rest of their life, after which someone else is to have it (e.g. for someone to live in your house for the remainder of their life).

Item	
Full name and address of the person to have the item for the rest of their life	
Full name and address of person/charity to have it thereafter	

INHERITANCE TAX & LIFETIME GIFTS

If you have made any large gifts in your lifetime and do not survive 7 years from the date of the gift, then the recipient of the gift may have to pay Inheritance Tax on that gift. Do you want the recipient to pay that tax or would you wish your Estate to pay IHT on the Lifetime gift?

RELEASE OF DEBTS

Would you wish to release anyone from an obligation to repay any debts they owe you at your date of death?

If so, please give details:

ASSET SCHEDULE**Your Home**

How do you own your home? <input type="checkbox"/> Sole owner <input type="checkbox"/> Joint owner (joint tenants) <input type="checkbox"/> Joint owner (tenants in common)	What is the value of your home or your share of your home?
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Name of joint owner	
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Do you own any other properties? If so, how do you own them? <input type="checkbox"/> Sole owner <input type="checkbox"/> Joint owner (joint tenants) <input type="checkbox"/> Joint owner (tenants in common)	What is the value of the property or your share in the property?
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Name of joint owner	
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Foreign Property

Do you own any property abroad? If so, how do you own it? <input type="checkbox"/> Sole owner <input type="checkbox"/> Joint owner (joint tenants) <input type="checkbox"/> Joint owner (tenants in common)	What is the value of the property or your share in the property?
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Name of joint owner	
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Have you made a separate Will in the Country where any other property is located, or have you sought local legal advice?

- Yes
 No

Please give details:

OTHER ASSETS

	Approximate Value		Tick if owned jointly
	You	Your Spouse/Partner	
Contents of your home			
Car			
Jewellery			
Cash at Bank			
Cash at Building Society			
Quoted stocks and shares			
Partnership share or value of a sole business			
PEPs			
TESSA			
ISAs			
Unquoted stocks and shares (e.g. in a private company)			
Other assets, (e.g. investment property - please specify)			
Trust property			
Foreign Assets			
Business & Agricultural property			
Lifetime gifts			
Have you made any gifts (over £3,000 a year)?			

Have you made any loans that have not been repaid (including loans to family members)?

Yes
 No

Loan	Amount	Date	Written agreement	Terms (Interest, when repayable):

LIABILITIES

	Amount	Tick if in joint names
Mortgage		
Loans/Overdraft/Credit Cards		

LIFE ASSURANCE POLICIES

Life Insurance Company	Policy Number	Sum Assured	Premiums	Purpose of Policy	Whether or not in Trust

PENSION DEATH BENEFITS

Pension Scheme/Policy	Amount of Death Benefit	Widow's/Widower's Pension	Is Death Benefit in Trust?	Nomination Form Completed?