Will Instructions Questionnaire

**Identification**

Full name: …………………………………………………………………………………………………………….

Any other names known by: …………………………………………………………………………………………………………….

Main address: …………………………………………………………………………………………………………….

…………………………………………………………………………………………………………….

Phone number: …………………………………………………………………………………………………………….

Do you spend any amount of time in other countries? If so give details

………………………………………………………………………………………………………………………………………………………………………

Date of birth …………………………………………………………………………………………………………….

Marital status …………………………………………………………………………………………………………….

Past marriage(s)/civil partnerships …………………………………………………………………………………………………………….

Any other children (not blood-related/adopted):

………………………………………………………………………………………………………………………………………………………………………

Previous Wills made (please provide a copy)

………………………………………………………………………………………………………………………………………………………………………

Funeral wishes

………………………………………………………………………………………………………………………………………………………………………

**Executors** - names and addresses (consider including replacements)

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**Guardians** – names and addresses (consider including replacements)

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Existing guardianship[s](https://www.solicitormidlands.co.uk)

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Pensions (are they nominated?)

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………………………………………………………………………………………………………………………………………………………………………

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Life insurance (are they nominated?)

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**Personal possessions**

Specific gifts of possessions –

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**Who should pay the costs of packing, shipping and insurance?** Recipient / my estate

Remainder of personal possessions to –

………………………………………………………………………………………………………………………………………………………………………

**Land and buildings** – give full address and full details of who should inherit

Make a note if there is a mortgage – how much outstanding / business use / agricultural use

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Pets (any conditional cash gift?)

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Cash gifts

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Gifts to charity

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Discretionary trusts

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Business or agricultural property

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Residuary estate (everything that’s left)

………………………………………………………………………………………………………………………………………………………………………

**Debts**

Owed to you:

…………………………………………………………………………………………………………………………………Write off at death? Y / N

You owe:

………………………………………………………………………………………………………………………………………………………………………

**Lifetime gifts**

………………………………………………………………………………………………………………………………………………………………………

………………………………………………………………………………………………………………………………………………………………………

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