

STONE KING LLP

WILL QUESTIONNAIRE FOR CLIENTS

1. PERSONAL DETAILS

Full name(s) Partner 1		
Partner 2		
Address		
Telephone		
Email		
Date of birth	1	2
Domicile (e.g. England & Wales)	1	2

2. FAMILY DETAILS

Marital status	Married / Civil Partnership / Single / Divorced / Separated / Cohabiting/ widowed/widower	
Previous marriage? Yes/No	1	2
Plans to marry/enter into a civil partnership?	Yes/No	
Children and grandchildren Full names and addresses and dates of birth		

3. ASSETS

Please give approximate values of assets held in your sole name, in joint names and by your partner

	Self	Joint	Partner
Bank/building society accounts			
Investments - stocks & shares; ISAs			
Life policies			
Death in service benefits			
Land & buildings Family home Contents 2 nd home Others			
Pensions			
Business & farm assets			
Cars Boats Valuables			
Possible future inheritances			
Foreign assets			
Trust interests – any powers of appointment?			
Others			

4. LIABILITIES

Mortgage	
Business	
Credit card/bank loans	
Other	

5. INHERITANCE TAX

<p>Please give details of all gifts made by you within the last 7 years exceeding £3,000</p> <p>In particular, if you are married, give details of all significant gifts between you</p>	1	2
<p>Are you a beneficiary of a trust? If so please give details</p>	1	2

6. FUNERAL WISHES AND LIVING WILL ARRANGEMENTS

Please indicate whether you have any funeral wishes and/or whether you wish to consider making a Living Will (instructions about medical treatment) or Powers of Attorney, or require further information on these subjects.

<p>1</p> <p>Burial <input type="checkbox"/> Cremation <input type="checkbox"/></p> <p>Living Will <input type="checkbox"/></p> <p>Powers of Attorney <input type="checkbox"/></p>	<p>2</p> <p>Burial <input type="checkbox"/> Cremation <input type="checkbox"/></p> <p>Living Will <input type="checkbox"/></p> <p>Powers of Attorney <input type="checkbox"/></p>
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7. EXECUTORS

You can name up to four people to act – it is normal for a couple to appoint each other plus one or two children if old enough, siblings, best friends. Professionals are a fallback if family not suitable, or a “neutral” person wanted

Would you like Stone King to provide one or more executors?	1	2
Full names and addresses of executors		
Full names & addresses of substitute executors if first choice cannot act		

8. GUARDIANS OF CHILDREN UNDER 18

Full names and addresses of guardians	
Full names and addresses of substitutes	

9. LEGACIES OF CASH, LAND AND PERSONAL POSSESSIONS etc

State beneficiary's full name and address, and the amount or object of the legacy. Generally legacies are paid before the rest of the estate is distributed. It is normal to leave the house contents and other personal possessions to a surviving spouse/civil partner, apart from a few selected items to others. Often this is dealt with by a subsidiary "letter of wishes"

Legatee (i.e. grandchildren/ friends/godchildren/charities)	Legacy (e.g. £1,000 / my stamp collection)

10. RESIDUE

Please give details of the beneficiaries of the rest of your estate i.e. what is left after all the legacies and tax and expenses have been paid.

Typically you may decide to leave your estate to your partner and if they have died before you to your children or failing them to your grandchildren. This may vary in the case of second marriages and a trust may be appropriate. Confirm if you want to impose a binding obligation on your partner not to change their will after your death.

Name and address of beneficiary	Share of residue (e.g. All/50%/1/4)	Conditions (e.g. the age to inherit at, typically 18,21 or 25)
Name and address of substitute beneficiaries (in the event the initial beneficiaries do not survive)	Share of residue (e.g. All/50%/1/4)	Conditions (e.g. the age to inherit at, typically 18,21 or 25)

11. OTHER ASSOCIATED ISSUES TO ADDRESS?

Pensions

Review pensions for long term planning before and after retirement
Review death benefit position
Review tax considerations

Life insurance

Review death in service arrangements
Review trust arrangements for personal policies

Powers of attorney

Review need for lasting powers of attorney – finance and health?

Living wills

Review need for advance directive

Long term care and care financing

Review arrangements in place (if any)
Review funding options

Dated

2015

Signed : 1 **2**