

MILNE MOSER

SOLICITORS

Will Questionnaire for Couples Making Mirror Wills

Please complete this questionnaire as fully as possible before you meet with us to discuss your Wills. Do not worry if you are not able to complete the questionnaire in full; we will guide you through the process when we meet.

If you do not want mirror Wills, please would you each complete the Will Questionnaire for Single People.

You and Your Family

Title		Title	
First Names		First names	
Surname		Surname	
Any other name known by		Any other name known by	
Address		Address	
Telephone no.		Telephone no.	
Email address		Email address	
Date of birth		Date of birth	
Occupation		Occupation	
Details of previous marriages / civil partnerships		Details of previous marriages / civil partnerships	
Date and place of current marriage / civil partnership:			
If either of you have been widowed please confirm the details.			

Children from current marriage / civil partnership / relationship

Full name	
Date of birth	
Address	
Full name	
Date of birth	
Address	
Full name	
Date of birth	
Address	

Children from previous marriage / civil partnership / relationship

Parent	
Full name	
Date of birth	
Address	
Parent	
Full name	
Date of birth	
Address	
Parent	
Full name	
Date of birth	
Address	
Parent	
Full name	
Date of birth	
Address	

Please confirm if any of your step-children have been formally adopted by you.	
--	--

Your Joint Assets

Your Home is owned in:

Sole name of:	
Your joint names:	
Value of your home:	
Amount of outstanding mortgage:	

or

You rent your home:	
---------------------	--

or

Other, please give details:

Do you own other properties; if yes, detail as above	
--	--

Do either of you have a business. If yes, please provide details of the business, confirming if it is a company, a partnership or are you a sole trader	
---	--

Do either or you own anything with another person jointly; if yes, provide details and value	
--	--

Do you own foreign assets; if yes, provide details and values; and confirm if you have made a foreign Will	
--	--

Value of your personal possessions e.g. vehicles, jewellery, house contents	
---	--

Funds in banks / building societies - provide the name of sole account holder or if held jointly, and values held	
---	--

Investments & shares – provide the name of sole holder or if held jointly, and values	
---	--

Liabilities not including mortgages	
-------------------------------------	--

Other information:

Your Will Choices

Funeral Wishes

You can specify in your Will if you would like to be buried, cremated or you can simply omit these wishes.

	Cremation	Burial	No preference
Spouse / Civil Partner / Partner 1			
Spouse / Civil Partner / Partner 2			

It is always best to make your funeral wishes known to your immediate family and not rely on your Will to inform them.

If you want to leave your body for medical research, you should make these arrangements during your lifetime and let your immediate family know your wishes.

Executors

Executors are responsible for gathering in your assets and paying your debts, and following your wishes as set out in your Wills. A maximum number of four executors can be named on the Grant of Probate, but you can name only one.

You can appoint friends, family or professionals to be your executors (or any combination of them). You should check that they are willing to be your executors and you should choose those who you would normally expect to survive you.

Couples often chose their surviving spouse / civil partner / partner to be their sole executor if they die first, and then choose other executors if they die second.

Do you each want your spouse / civil partner / partner to be your sole executor if you die first	YES / NO
If yes, please provide the details of the executor/s to be appointed when you have both died e.g. full names, addresses and relationship to you.	
If no, please provide the details of the executor to be appointed on the first death, and then the details of the executor/s on the second death e.g. full names, addresses and relationship to you.	

Guardians

Please nominate someone to be the legal guardian of your children (or any children you have parental responsibility for) if both parents (or all those with parental responsibility) die before they attain the age of 18.

If you are no longer married to, or no longer in a civil partnership with a child's other parent (or have never been married to or been in a civil partnership with the other parent) please make this known at your appointment.

The appointment of a guardian will usually only take effect if both parents (or all of those with parental responsibility) have died.

You should check that your proposed guardians are happy to take on this role should the worst happen.

First Guardian	
Full name	
Address	
Their relationship to you	

Joint/Substitute Guardian	
Full name	
Address	
Their relationship to you	

You may also want to draft your own Letter of Wishes with guidance for a guardian in the event of their appointment.

Legacies

Most couples leave their entire estates to the surviving spouse / civil partner / partner, and then detail other legacies when both have died. You do not have to do this.

Do you both want to leave your entire estate to your surviving spouse / civil partner / partner if you die before them?	YES / NO
If no, we can discuss this when we meet, and you need not complete the rest of the form, but you do need to think through your wishes.	

When you have both died would you like to give fixed sums of money to certain people or organisations?

Amount	Full Name	Address	Date of birth if they are under 18

When you have both died would you like to leave certain possessions to anyone?

Specific description of item	Full Name	Address	Date of birth if they are under 18

Your residuary estate is what is left after all your debts have been paid and your legacies and gifts have been paid / transferred. It is always best to think of dividing your residuary estate into shares or percentages.

Full name	Share /Percentage	Date of birth if they are under 18

If you leave a share of your estate to a child, and they die before you, their share will pass to their own children. If this is not what you want, or there are any step-children involved, or your children may not have their own children when you die, you need to think about what you would like to happen if a child dies before you.

Likewise, if any other person dies before you to whom you are leaving a gift or part of your estate.

When you have completed the questionnaire please sign and date it and return it to our office. Please do not send it by email.

Signed..... Signed.....

Name..... Name.....

Date.....