

SECTION 1 – PERSONAL DETAILS

YOUR DETAILS (please include any alias name)	YOUR HUSBAND/WIFE/PARTNER/CIVIL PARTNER
ALL FORENAMES	ALL FORENAMES
SURNAME	SURNAME
ADDRESS	ADDRESS
POSTCODE	POSTCODE
DATE OF BIRTH	DATE OF BIRTH
TEL NO (HOME)	TEL NO (HOME)
TEL NO (MOBILE)	TEL NO (MOBILE)
OCCUPATION	OCCUPATION
MARITAL STATUS	
HAVE YOU BEEN MARRIED/ENTERED IN TO A CIVIL PARTNERSHIP BEFORE? <input type="checkbox"/> YES <input type="checkbox"/> NO	
IF YOU ARE UNMARRIED/LIVING WITH A PARTNER, DO YOU INTEND TO MARRY/ENTER IN TO A CIVIL PARTNERSHIP IN THE NEAR FUTURE? <input type="checkbox"/> YES <input type="checkbox"/> NO	
DO YOU HAVE A CURRENT WILL? <input type="checkbox"/> YES <input type="checkbox"/> NO	
WHEREABOUTS OF YOUR CURRENT WILL?	
YOUR CHILDREN (PLEASE INCLUDE ALL OF YOUR CHILDREN INCLUDING FROM A PREVIOUS MARRIAGE OR RELATIONSHIP)	
FULL NAME	FULL NAME
DATE OF BIRTH	DATE OF BIRTH
ADDRESS	ADDRESS
POSTCODE	POSTCODE
FULL NAME	FULL NAME
DATE OF BIRTH	DATE OF BIRTH
ADDRESS	ADDRESS
POSTCODE	POSTCODE
DO YOU HAVE ANY OTHER CHILDREN? PLEASE CONTINUE OVERLEAF	
ARE YOU PERMANENTLY RESIDENT IN ENGLAND AND WALES? <input type="checkbox"/> YES <input type="checkbox"/> NO	
IF NO, ARE YOU CONSIDRED TO BE DOMICILED IN ENGLAND AND WALES? <input type="checkbox"/> YES <input type="checkbox"/> NO	

QUESTIONNAIRE FOR DRAFTING YOUR WILL

BUSINESS ASSETS	
DO YOU RUN YOUR OWN BUSINESS? <input type="checkbox"/> YES <input type="checkbox"/> NO	
IF YES, PLEASE STATE THE APPROXIMATE SIZE	
TURNOVER £.....	NO OF EMPLOYEES?.....
PLEASE PROVIDE US WITH YOUR ACCOUNTANT'S DETAILS?.....	
DETAILS:	
DO YOU OWN PROPERTY OR OTHER ASSETS ABROAD?	
DETAILS	
GIFTS	
Please specify if, in the last 7 years, you have made any significant gifts of sums of money or property, the total value of which for any year exceeded £3,000 <input type="checkbox"/> YES <input type="checkbox"/> NO	
AMOUNT £.....	

SECTION 4 – BENEFICIARIES

YOUR BEQUESTS	
Before dealing with the residue of your estate are there any specific sums of money which you wish to leave to a particular person/charity?	
If so please give the amount(s) you wish to give and the full name(s) of the recipient(s) together with their address(es) and if appropriate, relationship(s) to you.	
FULL NAME	FULL NAME
ADDRESS	ADDRESS
POSTCODE	POSTCODE
AMOUNT £.....	AMOUNT £.....
RELATIONSHIP	RELATIONSHIP
FULL NAME	FULL NAME
ADDRESS	ADDRESS
POSTCODE	POSTCODE
AMOUNT £.....	AMOUNT £.....
RELATIONSHIP	RELATIONSHIP

QUESTIONNAIRE FOR DRAFTING YOUR WILL

If you need more space please use a separate sheet

Are there any specific items, for example, jewellery, which you wish to leave to a particular person? YES NO

Please prepare a list of items and details of the beneficiaries that you wish to receive such items.

YOUR RESIDUARY ESTATE

The residue is the sum of property and monies remaining after payment of any bequests, debts and administration expenses

Please state to whom you would wish the residue of your estate to pass upon your death.

FULL NAME	FULL NAME
ADDRESS	ADDRESS
POSTCODE	POSTCODE

Please continue on a separate sheet if necessary

If the above person(s) die before you, to whom would you wish the residue of your estate to pass? This could be in unequal shares.

FULL NAME	FULL NAME
ADDRESS	ADDRESS
POSTCODE	POSTCODE

Please continue on a separate sheet if necessary

If any of the beneficiaries are under 18 years of age, please indicate the age you wish for them to inherit. Please note this may have tax implications.

18

21

25

ARE THERE ANY POTENTIAL BENEFICIARIES THAT YOU DO NOT WISH TO BENEFIT? For example, if you have two children and you only wish to leave your estate to one of them.

ARE ANY OF YOUR BENEFICIARIES MENTALLY OR PHYSICALLY HANDICAPPED?

YES

NO

IS YOUR ABILITY TO READ OR SIGN YOUR WILL AFFECTED BY ANY PHYSICAL CONDITION?

YES

NO

PLEASE PROVIDE US WITH ANY INFORMATION THAT YOU FEEL IS RELEVANT TO THE WRITING OF YOUR WILL?

HAVE YOU MADE AN ENDURING POWER OF ATTORNEY? YES NO

IF YOU HAVE NOT MADE AN ENDURING POWER OF ATTORNEY, WOULD YOU LIKE TO RECEIVE SOME FURTHER INFORMATION ABOUT THESE DOCUMENTS? YES NO

PLEASE RETURN THE COMPLETED QUESTIONNAIRE TO
MEADE KING SOLICITORS, 11-12 QUEEN SQUARE, BRISTOL
BS1 4NT Tel: 0117 926 4121 Fax: 0117 929 7578
www.meadeking.co.uk

Richard Boulding, Partner
Vanessa Eyre, Solicitor
Anna Molter, Solicitor
Samantha Piper, Trainee Legal Executive