

# CLIENT INSTRUCTION SHEET - WILLS

**Please complete this questionnaire as far as you can and either forward it to me in advance or bring it with you to the meeting.**

\*If throughout the form any spaces are insufficient, please use separate sheet.

<b>CLIENT 1</b>	<b>Existing/New (ID required if new)</b>		
<b>Title</b>	<b>First Name(s)</b>	<b>Surname(s)</b>	
Address			
Post Code			
Maiden/Previous Name (if applicable)			
Occupation		NI No	
Home Phone No	Work Phone No	Mobile No	
Email Address		Date & Place of Birth	

<b>CLIENT 2</b>	<b>Existing/New (ID required if new)</b>		
<b>Title</b>	<b>First Name(s)</b>	<b>Surname(s)</b>	
Address			
Post Code			
Maiden/Previous Name (if applicable)			
Occupation		NI No	
Home Phone No	Work Phone No	Mobile No	
Email Address		Date & Place of Birth	

## SECTION A - PERSONAL INFORMATION

QUESTION	CLIENT 1	CLIENT 2
<b>1. YOUR BACKGROUND</b>		
1.1 Are you (also) known as (or do you hold assets in) any other name or any variation(s) of the name given above?	Yes/No	Yes/No
1.2 Are you normally resident in England and Wales?	Yes/No	Yes/No
1.3 Please state nationality. If you are not a British national have you lived in England and Wales for the last 17 years?		

1.4 Do you already have a Will (and Codicil)? If yes, where is it?	Yes/No	Yes/No
1.5 Current status? Single/ With a partner/ Married/ Divorced/Widowed/Civil Partnership  Please mention if you have been previously separated or divorced as this can affect advice given  <i>(For Solicitor – if widowed discuss TNRB)</i>		
1.6 Were you involved in active service in any war/conflict (including as Doctor, Nurse or Journalist)? If so, did you sustain any injury in (or suffer any other effects from) that war/conflict which may directly or indirectly contribute to your death? Is there any evidence to support a claim for exemption from inheritance tax on these grounds?	Yes/No	Yes/No
<b>2. YOUR FAMILY</b>		
2.1 Do you have any children?  If yes, please give full name(s), address(es) and age(s)  Please also state whether from current marriage/relationship and whether they live with you	YES/NO	YES/NO
2.2 Do you have any grandchildren?  If yes, please give full name(s), address(es) and age(s)	YES/NO	YES/NO

<p>2.3 Are your parents alive?</p> <p>If so, please provide full name(s) and address(es)</p>		
<p>2.4 Do you have any brothers or sisters? If so, please provide full name(s) and address(es)</p>		
<p>2.5 Does anyone depend on you for financial support? (eg a child, an elderly or sick relative or a friend)</p> <p>If yes, please provide full details</p>		
<p>2.6 Who do you consider your next of kin?</p> <p>Give full name and address if not already mentioned.</p>		

<b>3. YOUR ASSETS - In England &amp; Wales ONLY</b> (Foreign assets should be detailed in section 4 below) We need to know the extent of your estate to determine what advice you need ie Inheritance Tax planning	<b>CLIENT 1</b>	<b>CLIENT 2</b>	<b>JOINT</b>
3.1 REAL PROPERTY - Please give details of any land/ houses/ flats/ commercial premises owned by you, including current value and any mortgage(s) outstanding			
3.2 BANK AND/OR BUILDING SOCIETY ACCOUNTS with approximate balances			
3.3 INVESTMENTS - such as stocks, shares, investment bonds, PEPs/ISAs, National Savings products etc. Please give an idea of value			
3.4 Value of PERSONAL BELONGINGS (sale not replacement). Inc cars, furniture, boats, paintings, collections etc.			
3.5 BUSINESS ASSETS - Do you own a business? If so, please provide full details and indicate how much it is worth			
3.6 Do you have any LIFE INSURANCE? Nominated or written in trust?			
3.7 Do you have a PENSION other than state pension? Are any benefits nominated or written in trust?			
3.8 Have you made any GIFTS or set up any trusts in the last 7 years?			
3.9 Do you have an INTEREST UNDER A FAMILY TRUST (poss referred to as a Power of Appointment) which should be considered in your Will?			
3.10 Any OTHER ASSETS eg loans made, likely inheritance?			
4. <b>FOREIGN ASSETS</b> - Please list all assets and liabilities outside of England and Wales			
5. <b>LIABILITIES</b> - Do you owe money to anyone eg Loans, Credit Cards			
<b>TAXABLE ESTATE</b>	£	£	£

## SECTION B - INSTRUCTIONS FOR YOUR WILL

QUESTION	CLIENT 1	CLIENT 2
<p>1. Who would you like to appoint as your Executors/Trustees? These are the people who will administer your estate after your death.</p> <p>1.1 Would you like to appoint the partners of Ellis Jones to act?</p> <p style="padding-left: 40px;">Yes, alone</p> <p style="padding-left: 40px;">Yes, jointly with:</p> <p style="padding-left: 40px;">Give names and addresses</p> <p>1.2 If you would like to appoint substitutes in case first choice dies before give their name(s) and address(es)</p>		
<p>2. If you have children under 18, do you wish to appoint legal guardians?</p> <p>If yes, please give names and addresses</p>		
<p>3. Would you like to gift any of your belongings (e.g. jewellery, pictures, antiques etc)?</p> <p>If so, what and to whom?</p>		
<p>4. Would you like to make a specific gift of land?</p> <p>If so, what and to whom?</p> <p>Is it to be an outright gift or for their lifetime (or other period)?</p>		

<p>5. Would you like to make any gifts of money?</p> <p>If so, how much and to whom?</p> <p>If the gift is to a child please specify the age</p>		
<p>6. If your estate is worth more than £325,000 (either alone or with your partner), would you like Inheritance Tax planning advice?</p>		
<p>7. If you are married or in a civil partnership, have you made any gifts (other than nominal amounts) to the other? If so, provide details</p>		
<p>8. State to whom you would like to leave the rest of your estate. If more than one, state the shares.</p> <p>(You can consider family, friends, charities etc)</p> <p>Please consider substitute provisions in case your first beneficiary(ies) die before you.</p>		
<p>9. Would you like funeral wishes included in your will? If so, please provide details.</p>		
<p>10. Any additional instructions?</p>		