

RadcliffesLeBrasseur

Wills Questionnaire

1

FULL NAME:	
ADDRESS:	

2 PROPERTY TO BE COVERED BY THE WILL:

- (a) World-wide?
- (b) UK only?
- (c) Other?

3 DECLARATION OF:

- (a) Domicile? (specify)
- (b) Applicable law? (specify)

4 BURIAL/CREMATION INSTRUCTIONS AND SPECIFIC MEDICAL REQUESTS

5 EXECUTORS:

	Name	Address	Relationship
(a)			
(b)			
(c)			
Substitute			

6 GUARDIANS OF INFANT CHILDREN:

	Name	Address	Relationship
(a)			
(b)			

7 CASH LEGACIES:

Amounts	Name & Address of Legatee	Free of/Subject to Tax	DoB (if under 18)

8 SPECIFIC (I.E. NON-CASH) LEGACIES:

Description	Name & Address of Legatee	Free of/Subject to Tax	DoB (if under 18)

Please indicate:

- (a) whether personal possessions are to be left to specific legatees named in the will or to executors, spouse or other beneficiary with a non-binding letter of wishes;
- (b) where any property to be given as a specific legacy is charged with a liability (eg a mortgage), whether the liability should be paid from that property or from other assets;
- (c) any age contingency or other restrictions.

9 RESIDUARY ESTATE:

Indicate order of priority

	INCOME:		CAPITAL:	
	As of right	At trustees' discretion	As of right	At trustees' discretion
Spouse				
Children				
Other class e.g. grandchildren				
Named individuals				
Charity				

- (a) Please give full names, addresses and dates of birth (where appropriate) and proportions to be taken
- (b) If income or capital to be given as of right, at what age?
- (c) Specify secondary and long stop beneficiaries. If a primary beneficiary dies before you, do you want their share to pass to their own children or to other named beneficiaries?
- (d) If to be held in trust (eg capital not to pass immediately as of right) specify:
 - (i) names and address of the trustees if not the executors
 - (ii) any limitations to be placed on the trustees' powers?
 - (iii) who is to have the power to appoint new trustees?