

NOTES

YOUR PERSONAL DETAILS

(if you have a partner, they can complete a separate questionnaire)

Full Name (including all middle names)	
Address	
Telephone no.	
Date of Birth	

- Married Single Divorced Widowed
 Civil Partner Co-habiting

Have you made a Will before? Yes No

Do you intend to marry or enter into a Civil Partnership in the near future? Yes No

Have you been married or been in a Civil Partnership before? Yes No

Do you have any children ? Yes No
If so, please list their details and state if they are from a previous relationship :-

Full name	Address	Date of Birth

APPOINTING EXECUTORS

Executors carry out the instructions in your Will. If your arrangements are simple, one executor will suffice, but it is a good idea to name two. If a child or trusts are involved, two executors are essential. Your executors can be relatives, friends or you can appoint Dale & Co. You should ask the person you wish to appoint as an executor before naming them in your Will, it is a serious obligation. Executors can be a beneficiary but cannot witness your Will.

MY EXECUTORS

Full Name	Address	Relationship to you
	Tel :	
	Tel :	

A GUARDIAN FOR YOUR CHILDREN

If you have children under the age of 18, you may wish to choose a guardian to take parental responsibility.

Full Name	Address	Relationship to you

MAINTENANCE FOR YOUR DEPENDENTS

Please name anyone who relies upon you for their financial maintenance.

Full Name	Address	Relationship to you

NOTES

Please note below any queries you wish to discuss at your interview.

Legacies continued.....

Full name and address of beneficiary	What gift do you want to leave?

FUNERAL DIRECTIONS

Ensure your loved ones are aware of your specific wishes. It may be uncomfortable thinking about these things now but it will make it easier for family and friends.

Would you prefer to be buried or cremated?

Specific wishes :	
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THE VALUE OF YOUR ESTATE

Completing this section will give an idea of the value of your estate. Please use current approximate valuations.

Assets - Please indicate if solely or jointly owned

Type of asset		£	Sole	Joint
Ownership/share of any property	Main Home			
	Other/Abroad			
Savings	Savings accounts			
	National Savings			
	Premium Bonds			
	Other			
Investments	Shares			
	PEP's			
	Other			
Insurance	Life Assurance			
	Pensions			
	Other			
Personal Possessions	Household contents			
	Jewellery			
	Vehicles			
	Valuables			
	Other			
Other assets				
Other income				
Total				

Liabilities - Please indicate whether solely or jointly owed

Type of liability		£	Sole	Joint
Mortgage				
Bank loans				
Credit cards				
Other				
Total				

WHO DO YOU WANT TO BENEFIT IN YOUR WILL?

If there is not enough room here to list all your beneficiaries and gifts, continue on a separate sheet of paper.

RESIDUARY ESTATE

After legacies, taxes, funeral expenses etc have been paid, what is left is the Residuary Estate.

Who would you like to receive your Residuary Estate?

Beneficiary's full name and address	What share of your estate

ALTERNATIVE BENEFICIARIES

It is a good idea to name alternative beneficiaries in case a beneficiary dies before you

Beneficiary's full name and address	What share of your estate ?

LEGACIES/GIFTS

Please list below any specific or monetary bequests you wish to make.

A pecuniary bequest is a gift of a fixed sum of money
 A specific bequest is a gift of a particular item
 A reversionary bequest is a gift of property or possessions left to someone for the rest of their life, which is then passed on to someone else.

Beneficiary's full name and address	What gift do you want to leave ?