

Making a Will

Thank you for choosing Russell-Cooke to make your Will. Please fill in this questionnaire using a ball-point pen and write clearly in CAPITAL LETTERS. Where relevant, please mark the relevant box with a clear tick. This form consists of four parts.

Please return this questionnaire to:

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If you have any queries or need help filling this form, please contact:
 Rebecca Fisher or Kieran Bowe

Part 1 – personal details

	You	Your partner
1.1 Your details		
Title (Mr, Mrs, Ms etc)		
Full name (inc. middle names)		
Other names in which assets are held, or previous names		
Address		
Email address		

	You	Your partner	
Contact numbers	Home	Home	
	Work	Work	
	Mobile	Mobile	
Date and place of birth			
Family status			
Date and place of marriage or civil partnership			
Residence for tax purposes			
Nationality			
Domicile			
Occupation			
1.2 Children of your relationship			
Full names (inc. middle names)	Date of birth		
1.3 Children of former relationships (if any)			
Full names (inc. middle names)	Child of you or your partner?	Is this child a dependant?	Date of birth

	You	Your partner
1.4 Deceased and former spouses or civil partners (if any)		
Name		
If the marriage ended by divorce please advise if the divorce was granted:	<input type="checkbox"/> before 1975 <input type="checkbox"/> outside England and Wales	<input type="checkbox"/> before 1975 <input type="checkbox"/> outside England and Wales
Is the former spouse or civil partner still alive?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is he or she a dependant?		
If the marriage or civil partnership ended by death please advise of the date of death (further information may be requested at a later date)		
Any other dependants (e.g. wards, elderly parents)		
Full name		
Date of birth		
Relationship		

Part 2 - contents of the Will

2.1 Executors

You need to decide who you would like to act as your executors and appoint them in your Will.

The duties of an executor are to collect in the estate of the deceased, to pay the deceased's debts and, after payment of any inheritance tax, to distribute the estate to the persons entitled under the Will. You can appoint between one and four executors, but if you appoint only one or two it is advisable to include substitute executors in case an executor is unable to act.

Your spouse can act as your executor. An executor must be aged 18 or over. Executors who live abroad can be appointed but it would be sensible also to include executors who live in the UK.

It is advisable to discuss the appointment with the intended executors to ensure that they understand and accept their responsibilities.

	You	Your partner
Executors' name		
Address		
Substitute executors' names		
Address		

2.2 Funeral wishes

You may include funeral directions in your Will but these will not be legally binding. You are advised to let your close family know of your wishes in case your Will is not referred to until after the funeral.

If you have strong wishes regarding organ donation you should ensure these are communicated to those closest to you and that you carry organ donation cards.

	You	Your partner
Do you wish your body to be:	<input type="checkbox"/> Buried <input type="checkbox"/> Cremated	<input type="checkbox"/> Buried <input type="checkbox"/> Cremated
And do you have any request for place of burial of body or scattering/burial of ashes?		

2.3 Guardians

You may appoint guardians of your minor children under the age of 18 in your Will. Generally the appointment of guardians will only take effect when both parents have died. Special rules may apply if you are a single parent, divorced or in a civil partnership.

It is advisable to discuss the appointment with the intended guardians to ensure that they understand and accept their responsibilities. They need to have a good working relationship with your executors/trustees.

In view of the potential disruption to the guardian's own family and the cost of caring for an additional child or children, you may wish to make a legacy or other provision for the guardians in your Will. We can advise you further.

Guardians to be appointed on the death of the survivor of you and your partner:

Full name(s)	
Address	

If you have child(ren) from a previous relationship, guardians to be appointed on the death of you (or your partner) and the child(ren)'s other parent

Names of children	
Full names(s) of guardian(s)	
Address	

2.4 Legacies

You may wish to include gifts of cash, or gifts of personal belongings in your Will.

A. Gifts (e.g. to godchildren, relatives, friends or charities)

	You	Your partner
Amount/item		
Full name of beneficiary		

B. Gifts of personal chattels (*not specifically disposed of above*)

Personal chattels include jewellery, clothing, furniture, furnishings, books, cars, animals, musical instruments, wines etc. not used for business purposes.

You may gift your personal chattels outright, or give them to a specific person or your executors to distribute in accordance with a memorandum of wishes. A memorandum of wishes is a letter to that individual or your executors saying how you wish them to divide your effects. It is a flexible arrangement and changes can be made without making a new Will.

	You	Your partner
To be distributed by executors	<input type="checkbox"/>	<input type="checkbox"/>
To form part of residue	<input type="checkbox"/>	<input type="checkbox"/>

C. Gifts of business assets (*e.g. shares in a business*)

When making a legacy of shares in private companies you must consider the terms of the shareholders agreement (if any) and whether the shares qualify for Business Property Relief. We can advise you further.

	You	Your partner
Name of company		
Full names of beneficiaries		

D. Gifts of agricultural property

When making a legacy of agricultural property you must consider Agricultural Property Relief applies. We can advise you further

	You	Your partner
Description of asset		
Full names of beneficiaries		

2.5 Residue

Your residuary estate is what remains after your executors have paid all debts, expenses, tax, administration costs and legacies.

If you are married or in a civil partnership, you may wish to benefit your spouse or civil partner outright (or there may be taxation and other advantages in using a continuing trust). We can advise you further.

If your spouse or civil partner does not survive you, then you may wish to benefit your children (if any) in default. If they are minors or young adults you may wish to delay distribution of capital to them until they are older (e.g. 18, 21 or 25). We can advise you further.

In the event that none of your residuary beneficiaries or default beneficiaries survives you, (for example you are all involved in a common accident) you are advised to appoint ultimate default beneficiaries to prevent your estate being distributed in accordance with the laws of intestacy.

It is recommended that you and your partner have identical ultimate default provisions (e.g. ½ to each side of the family); this eases the administration and ensures fairness between the two sets of families. Charities can also be named as default beneficiaries.

	You	Your partner
a) Residuary beneficiaries		
Name		
Address		
Proportions		
b) Default beneficiaries		
Name		
Address		
Proportions		

	You	Your partner
c) Ultimate default beneficiaries		
Name		
Address		
Proportions		

Part 3 – financial details

3.1 Main residence			
Address			
Is it:	<input type="checkbox"/> Freehold	<input type="checkbox"/> Leasehold	
Approx. market value			
If in joint names, is the property held as:	<input type="checkbox"/> Joint tenants	<input type="checkbox"/> Tenants in common	
If so, what proportions?			
Where are the deeds held?			
If there is a mortgage please provide name of mortgage provider and approx. amount outstanding	Name		Amount
Is there a life insurance policy assigned to the mortgage?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	You	Your partner	
3.2 Other UK properties (e.g. holiday homes, buy-to-let agricultural land)			
Address			
Is it:	<input type="checkbox"/> Freehold	<input type="checkbox"/> Freehold	
	<input type="checkbox"/> Leasehold	<input type="checkbox"/> Leasehold	
Approx. market value			
If in joint names, is the property held as:	<input type="checkbox"/> Joint tenants	<input type="checkbox"/> Joint tenants	
	<input type="checkbox"/> Tenants in common	<input type="checkbox"/> Tenants in common	
If so, what proportions?			
Where are the deeds held?			
If there is a mortgage please provide name of mortgage provider and approx. amount outstanding			
Name			
Amount			

	You	Your partner	
Is there a life insurance policy assigned to the mortgage?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Do you rent out the property?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	You	Your partner	Jointly
3.3 Cash (e.g. bank accounts, building society accounts)			
Cash held in joint bank accounts will automatically pass to the survivor by the law of survivorship, and not by Will.			
Brief details			
Total approx. amount			
3.4 Investments (shareholdings, unit trusts)			
Investments held in joint names will automatically pass to the survivor by law of survivorship, and not by Will.			
Brief details			
Total approx. amount			
3.5 Personal belongings of significant value other than ordinary household or personal effects (e.g. furniture, paintings, cars, boats, jewellery)			
Items owned jointly will automatically pass to the survivor by the law of survivorship and not by Will.			
Brief details			
Total approx. amount			
Do any qualify for heritage exemption? If so, HMRC ref.			

3.6 Policies

The proceeds of any life assurance policies, death benefits from pension policies and death in service benefits from your employer will be paid on your death either directly to your nominated beneficiaries (if the policies are written in trust) or into your estate to be distributed by your Will.

	You	Your partner
A. Life assurance policies		
Details of policy provider		
Life assured		
Approximate value.		
Is the policy written in trust?		
Who are your nominated beneficiaries?		
B. Pension policies		
Details of policy provider		
Are death benefits payable under the policy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Approx. value of death benefits		
Are the death benefits written in trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Who are your nominated beneficiaries?		
C. Death in service benefit		
Details of policy provider		
Approximate value of death in service benefit		
Are the death benefits written trust?		
Who are your nominated beneficiaries?		
3.7 Trust interests		
Do you have any interest under a trust created by you or any other person? Is this:		
Life Interest Trust	<input type="checkbox"/>	<input type="checkbox"/>
Accumulation & Maintenance Trust	<input type="checkbox"/>	<input type="checkbox"/>
Discretionary Trust	<input type="checkbox"/>	<input type="checkbox"/>
Date of trust deed		
Date of death of settlor (if a Will trust)		
Date your life interest was created (if a Life Interest Trust)		
What is the value of the trust assets?		

	You	Your partner
3.8 Loans		
Have you made any sizeable loans? If so, how much?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.9 Other information		
Do you expect to receive any property of substantial value in the near future, for example as an inheritance?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If so, please provide brief details		
Have you made any gifts of more than £3,000 within the last seven years? If so, please provide details of:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
(a) donee		
(b) item value or cash sum		
(c) date gifted		
Other than any mortgages, do you have any sizeable debts?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If so, how much?		

Part 4 – background

When drafting a Will for you, it is important for us to understand what factors are of fundamental importance to you. It is helpful to know your response to the following questions which we can discuss further with you and take into consideration when drafting your Will.

	You	Your partner
Have you made any Wills before, in England or elsewhere? If so, please supply a copy	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Where is the original held?		
Did you make an Enduring Power of Attorney before October 2007?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you made a Lasting Power of Attorney in relation to:		
(i) your property and affairs?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
(ii) your personal welfare?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
What is your reason for making a new Will? (e.g. current Will out-of-date; have never made a Will before; wish to add/remove beneficiaries; marriage/divorce)		
1. Is there any particular urgency? (e.g. illness; hospital stay; marriage; travel)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Brief details		
2. Is adequate provision for your spouse/civil partner of primary importance to you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Is the tax efficiency of your Will very important to you?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Are you concerned to provide for young or vulnerable members of your family?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Any other factors?		

I understand that Russell-Cooke's advice will be given on the basis of the information disclosed in this Will questionnaire, and I agree to notify them of any significant changes before I sign my Will.

Signed

Date

(If remitting the Will questionnaire by e-mail, a hard copy may be signed at the meeting)

Schedule one - assets situated outside the UK

Assets situated outside the UK can be included in your UK Will or you can have a separate Will for foreign assets. We can advise you which would be most appropriate.

	You	Your partner
A. Land and buildings		
In which country/state are they situated?		
Please give a brief description		
Name of other co-owners and shares in which the property is held (or details of company/trust, if applicable)		
Approx. value of your share		
Do you own the contents?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
B. Cash/investments		
In which country/state are they held?		
Please give brief details		
Approx. value		
In some countries, assets (or a share of them) must be passed on to family members by law.		
Please advise whether any of your following relatives are alive. This must include all living relatives including estranged ones, and illegitimate children.	<input type="checkbox"/> Spouse <input type="checkbox"/> Father/mother <input type="checkbox"/> Children <input type="checkbox"/> Grandchildren	<input type="checkbox"/> Spouse <input type="checkbox"/> Father/mother <input type="checkbox"/> Children <input type="checkbox"/> Grandchildren

Schedule two - business assets

The transfer of shares in a business or a partnership on death may be determined by the terms of the shareholder or partnership agreement. Their assets may also qualify for Business Property Relief and be exempt from inheritance tax. We can advise further.

Name of business		
Address		
Nature of business		
Does the business trade?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the business hold investment assets?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
How is the business organised?	<input type="checkbox"/> Unincorporated business under your sole control of you or your partner <input type="checkbox"/> Company	
How much of the company is owned by	You	Your spouse/civil partner/partner
Please provide details of the nature/number of shares held by you and also by your spouse/civil partner/partner	<input type="checkbox"/> Partnership	
How is the partnership organised?	<input type="checkbox"/> LLP <input type="checkbox"/> Limited partnership <input type="checkbox"/> General partnership	
Please provide details of the nature of your partnership interest and that of your spouse/civil partner/partner (if any)		