

Your Will

Client Questionnaire

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of our firm, and your appointment if made, are set out below.

Larcomes LLP
 168 London Road
 North End
 Portsmouth
 PO2 9DN

Your appointment is with.....
 Date
 Time

Tel: 023 9244 8100
 Fax: 023 9266 5701

PART A - YOU AND YOUR FAMILY

1. YOUR DETAILS

Forenames

Surname

Address

.....

..... Postcode.....

Tel No (Home).....(Work).....

Date of Birth

Occupation

National Insurance No.....

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

.....

.....

.....

.....

.....

2. YOUR HUSBAND/WIFE/PARTNER

Forenames.....

Surname

Date of Birth.....

Occupation.....

National Insurance No.....

3. MARRIAGE/PARTNERSHIP DETAILS

- (a) Date of Marriage
- (b) Please tick this box if you are not Married to your partner
- (c) Please tick this box if you are intending to marry/re-marry in the near future
- (d) Has either of you been married before? Yes No

4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP)
 - full names, dates of birth, and address if different from yours.

(a) Name

Date of Birth.....

Address.....

(b) Name.....
 Date of Birth
 Address

(c) Name.....
 Date of Birth
 Address

(d) Name.....
 Date of Birth
 Address

5. CHILDREN OF YOUR HUSBAND/WIFE/PARTNER'S PREVIOUS MARRIAGES OR RELATIONSHIPS - full names, dates of birth and address if different from yours.

(a) Name.....
 Date of Birth
 Address

(b) Name.....
 Date of Birth
 Address

(c) Name.....
 Date of Birth
 Address

Please note:

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice if appropriate.

PART B - YOUR HOME AND OTHER ASSETS AND LIABILITIES

6. YOUR HOME - Is your home:

- (a) Owned:
- (i) in your name alone? Yes No
 - (ii) in joint names with your husband/wife/partner? Yes No
 - (iii) in the name of your husband/wife/partner alone? Yes No
- Value
- (b) Rented? Yes No
- (c) Other - e.g. provided by a relative? Yes No

7. If your answer was (c) please give more details:

.....

8. DO YOU HAVE A BUSINESS? Yes No

If yes: state type of business

.....

Is it a (tick box):

- Company Partnership In your sole name

9. YOUR MAIN ASSETS

Please give approximate values of your other main assets below:-

House contents

Antique.....

Jewellery.....

Car

Special collections (eg coins, stamps etc).....

Pension

Building Society Accounts

Bank Accounts

National Savings

Income Bonds

Deposit Bonds

Premium Bonds

Unit Trusts

Shares

Government Stocks

Life Policies

Benefits from another person's estate

Other

10. YOUR LIABILITIES

Please give approximate values of your main liabilities below:-

First Mortgage

Second Mortgage

Other Loans

Overdraft

Hire Purchase

Credit Cards

Other

11. DO YOU OWN ANY ASSETS ABROAD?

If yes, please give details:-

.....

.....

PART C - FUNERAL, EXECUTORS, GUARDIANS

12. FUNERAL

You may specify in your Will if you wish to be:-

Buried Cremated No Preference

Please note:

- You should make these wishes known to your immediate family as well and not rely on what is in your Will.
- If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card.

13. EXECUTORS/TRUSTEES

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. A beneficiary can also be an executor. You should name other executors to act if he/she is unable to do so. Members of Larcomes LLP will be pleased to act as your executors, either alone or with a member of your family or friend.

List below up to four chosen executors

(a) Name

Address.....

.....

(b) Name

Address.....

.....

(c) Name

Address.....

.....

(d) Name

Address.....

.....

Would you like Members of Larcomes LLP to act as executors? Yes No

14. GUARDIANS

Guardians should be considered if you have children who are under the age of 18 years or if you expect to have children at a later date. Should you or your spouse be involved in a common accident leaving an infant child or children surviving you, it is a

good idea to name a person or persons whom you would like to care for and bring up your children. Appointment of a guardian does not mean that the children have necessarily got to live with the guardian. It merely means that it is the guardian who will have the say on where the children will live and how they are brought up and educated etc. A guardian can also be an executor or trustee.

(a) Name.....
 Address.....

(b) Name.....
 Address.....

PART D - BENEFICIARIES

The main part of your estate is called "the residue". This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

15. CASH GIFTS

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

(a) Name.....
 Address.....
 Amount £.....

(b) Name.....
 Address.....
 Amount £.....

(c) Name.....
 Address.....
 Amount £.....

(d) Name.....
 Address.....
 Amount £.....

16. GIFTS OF ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will not be given the substituted item or the cash equivalent.

(a) Name.....
 Address.....

 Article.....

(b) Name.....
 Address.....

 Article.....

(c) Name.....
 Address.....

 Article.....

(d) Name.....
 Address.....

 Article.....

17 THE RESIDUE

This is all monies or property (except jointly owned property) which is remaining after payment of any cash gifts, debts and all other expenses in administrating the estate and payment of Inheritance Tax (if any).

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 18.

- (a) Everything to my husband/wife/partner named in question 2 above, outright, but if he/she has died then to my children, named at question 4 above, equally;
- (b) Everything to my children, named at question 4 above, equally;
- (c) Any named beneficiary who is 18 or under can call for payment of all monies due to them after reaching the age of 18. If you wish to prevent young beneficiaries from receiving this entitlement at such an age please specify the age at which they may receive their entitlement below;

- (d) To my husband/wife/partner named at question 2, but if he/she has died before me to the person(s)organisation(s) named in the box below. If not in equal shares, then show the share each is to take.

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.....

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17. IF NONE OF THE ABOVE CHOICES ARE APPROPRIATE

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

(a) Name.....

Address.....

.....Share.....

(b) Name.....

Address.....

.....Share.....

Who is to benefit if the recipient dies before you?

(a) Name.....

Address.....

.....Share.....

(b) Name.....

Address.....

.....Share.....

You can leave someone a share in your estate for their lifetime only so that they will receive the income from the capital monies invested for their lifetime and then after their death the capital will go to another named beneficiary. Please tick this box if you wish to create a life interest and we will take your further instructions

GENERAL NOTES

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
2. On divorce, gifts to you husband/wife are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is far better to make a new Will.
3. If you are not making any provision for a husband/wife/partner, or other dependant, or a former husband/wife/partner, it is possible that he/she could make a claim against your estate. If this does apply please tell us.
4. Please feel free to ask for our help or advice for more information on any topic related to your Will during your appointment.
5. Any Will which you make may subsequently be altered or revoked at any time unless it specifies that it is made on special terms to the contrary. If you wish to impose terms you must tell us.
6. If there is to be an ongoing trust (as will be the case if there are infant beneficiaries or a life interest to a beneficiary), the Executors can continue to act as trustees of the trust or you can, if you wish, appoint separate trustees (for example you may wish to appoint the children's guardians to act also as trustees).