

# making a will

pre-interview questionnaire



hodge jones & allen  
solicitors



# Making a will - pre-interview questionnaire

This form enables you to provide us with the essential information we require in order to prepare your will. Once you have completed this form, please return it by post or email prior to your appointment. At our meeting, we will have all the information to be able to discuss your specific circumstances and wishes, leaving us with a complete picture of your situation so that we are able to tailor an individual will to suit you.

If you are unsure as to how to complete any part of this form or wish to discuss an issue in detail, we would be happy to go through this with you at our meeting.

Should your spouse or partner also wish to make a will, we are able to offer a reduced rate for the preparation of two wills in similar terms.

## A. Personal Details

Full Name (including title and any middle names)

Any other name by which you are known

Do you own any assets in this name?

Yes

No

Date of birth (Day / Month / Year)

Place of birth (City / Country)

Occupation

Nationality

National Insurance Number

Domicile

Home address

Home telephone number

Work telephone number

Mobile telephone number

Email address

## B. Relationship Details

Your current Marital Status (tick one)

- Never been married  
 Married  
 Divorced  
 Widowed  
 Married but separated  
 Civil Partnership

Date of marriage or civil partnership

Full name and address of spouse/civil partner

Please state any other names by which your spouse/civil partner is known

Date of birth of your spouse/civil partner

Place of birth of your spouse/civil partner

If you are not married/in a civil partnership, but you are living with a partner, state the date you started co-habiting

If you are not married/in a civil partnership, please indicate if you are contemplating marriage/civil partnership or if you are engaged to be married/intend to enter a civil partnership?

If married/in a civil partnership, are you contemplating divorce?

If you have been divorced, was there a Court Order dealing with the finances? If so, please provide a copy.

Are you making maintenance payments? Please provide a copy of the Court Order (if not included in the Order above)

Yes  No

Have you been widowed? If so, please provide a copy of any will that was left by your spouse. Please state the date of your spouse's death.

Has your current spouse/civil partner been married previously?

Has your current spouse/civil partner been widowed prior marrying you?

Please add any applicable comments

# C. Children

How many children do you have?

Please specify the full name, address and date of birth of each child

Name

Address

D.O.B.

Name

Address

D.O.B.

Name

Address

D.O.B.

Name

Address

D.O.B.

If any of your children are adopted please provide the date of adoption

If you have step-children please provide the name and address of the other parent

Please state if any of your children are in education and/or still reside with you

Do you have any dependants or maintain anyone in any way, either in actual money or monetary value? If so please provide details

## D. Grandchildren

Please provide the full name, address and date of birth of any grandchildren you have, together with the names of their parents.

Grandchild 1

D.O.B.

Parents:

Grandchild 2

D.O.B.

Parents:

Grandchild 3

D.O.B.

Parents:

Grandchild 4

D.O.B.

Parents:

Grandchild 5

D.O.B.

Parents:

# E. Your Assets

If there is not enough room on this page, please give details on a separate sheet. If any of the assets are jointly held, please specify who the joint owner is and the proportion you own (ie 50/50, or 75/25).

ASSET	DESCRIPTION	VALUE	JOINTLY HELD? Yes <input type="checkbox"/> No <input type="checkbox"/>	NAME OF JOINT OWNER
Home	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<div style="border: 1px solid black; height: 20px; width: 100%;"></div>

Is it mortgaged? Yes  No

How much is the capital outstanding on the mortgage?

If the property is not mortgaged, where are the Deeds?

ASSET	DESCRIPTION	VALUE	JOINTLY HELD? Yes <input type="checkbox"/> No <input type="checkbox"/>	NAME OF JOINT OWNER
2nd property	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<div style="border: 1px solid black; height: 20px; width: 100%;"></div>

Is it mortgaged? Yes  No

How much is the capital outstanding on the mortgage?

If the property is not mortgaged, where are the Deeds?

Stocks and Shares / Unit Trusts	HOLDING	VALUE	JOINTLY HELD?		NAME OF JOINT OWNER
			Yes	No	
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>

Where are the share certificates?

ASSET	DESCRIPTION	VALUE	JOINTLY HELD?		NAME OF JOINT OWNER
			Yes	No	
Bank Accounts			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

Building Society Accounts			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

National Savings Accounts or Products			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

**Life Policies** (if any of these are written in trust, please say so)

VALUE  
  
 JOINTLY HELD?  
 Yes  No   
 ON YOUR LIFE ONLY?  
 Yes  No

**Pensions** (any State or occupational pensions you currently receive or you are entitled to in the future)

VALUE  
  
 ARE YOU DRAWING ANY PRIVATE PENSION NOW?  
 Yes  No

ASSET

DESCRIPTION

Business Property  
(e.g. Private Company  
Shares/Sole trader/  
Partnerships)

VALUE

NAME OF JOINT OWNER

WHAT PROPORTION  
DO YOU OWN?

Agricultural Property  
(Please specify if buildings  
are not occupied by  
farm worker)

VALUE

JOINTLY HELD?

Yes  No

NAME OF JOINT OWNER

Do you own any  
property occupied  
by a third party?

VALUE

JOINTLY HELD?

Yes  No

NAME OF JOINT OWNER

Do you have any  
foreign assets?

VALUE

JOINTLY HELD?

Yes  No

NAME OF JOINT OWNER

Personal Chattels  
(Please specify any items  
of value held, such as  
furniture or jewellery)

VALUE

VALUE

VALUE

VALUE

ASSET

DESCRIPTION

Do you own any other assets, you have not yet mentioned?

VALUE

JOINTLY HELD?

Yes  No

NAME OF JOINT OWNER

Are you currently a beneficiary of a trust or are you due to inherit in the future?

(Please provide details of Solicitors/Trustees involved and details of the assets held in trust)

Have you made any gifts (either in money or assets)? If so please provide details and the date on which the gift was made.

ESTIMATED VALUE OF YOUR ESTATE: £

## F. Previous Wills

Have you made a will in the UK before?

If yes, please state the date the UK will was made

Who drafted the will?

Where is the original will currently kept?

Do you have a copy? (if so please provide us with a copy)

Do you have an existing foreign will?

If yes, please state the date the foreign will was made

Who drafted the will?

Where is the original will currently kept?

Do you have a copy? (if so please provide us with a copy)

## G. Your New Will

Full name and address of your proposed  
Executors

Executor 1

Relationship to you

Executor 2

Relationship to you

Full name and address of substitute  
Executors (This is in case your chosen Executors  
unable or unwilling to act.)

Substitute Executor 1

Relationship to you

Substitute Executor 2

Relationship to you

Full names and addresses of intended Guardians of any minor children you may have

Intended Guardian 1

Relationship to you

Intended Guardian 2

Relationship to you

### Funeral or Burial Requirements

If you would like information on arranging a pre-paid funeral plan, please tick here.

**Specific Gifts:** (Please state items (if any) you wish to give specifically in your will and if you are giving instructions as a married couple/civil partnership, state which death they are to take effect, ie first death or second death.)

GIFT DESCRIPTION	FREE OF INHERITANCE TAX		DEATH	
1 <input type="text"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	1st <input type="checkbox"/>	2nd <input type="checkbox"/>
2 <input type="text"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	1st <input type="checkbox"/>	2nd <input type="checkbox"/>
3 <input type="text"/>	YES <input type="checkbox"/>	NO <input type="checkbox"/>	1st <input type="checkbox"/>	2nd <input type="checkbox"/>

(please continue on a separate sheet if necessary)

### Legacies

Full name and address of legacy recipients (date of birth if recipient is under eighteen)

1 Name and Address

D.O.B.

Amount

2 Name and Address

D.O.B.

Amount

3 Name and Address

D.O.B.

Amount

(If you are giving instructions as a married couple/civil partnership, state on which death the legacy is to take effect.) Please tick box: My death  Death of spouse/partner

How old is the recipient to be before they inherit (if they are now under 18)?

18  21  25  Other (please state)

# H. Residue of Estate

Please specify who will take the rest of your estate

NAME & ADDRESS

AMOUNT  
Proportion or %

AGE  
at which they  
inherit if under 18

1

2

3

Please state who will inherit if neither your family nor those listed above survive you.

SIGNED

NAME

DATE

# What happens next?

On completion of this questionnaire, you will need to arrange a short (up to 1 hour) appointment with a will drafting specialist. This time will be constructively spent understanding exactly how you want your estate to be distributed at your death and discussing any further issues that may arise such as inheritance tax, etc. We will then prepare the will for you. We offer a safe and secure wills storage facility where your will can be placed at no extra charge.

Contact Sarah Boulter: Direct Tel: 020 7874 8559      Main Tel: 020 7874 8300  
Fax: 020 7874 8303      Email: sboulter@hja.net      Website: www.hja.net

## Online wills register with Certainty.co.uk

We are now able to provide a service to register your will with [Certainty.co.uk](http://Certainty.co.uk), the new National Wills Register. This secure online database keeps a record of where your will is held and allows family members to locate a will after death. As changes in circumstances can often mean that people are unaware of the location of a family member's will or that a new will has been made, this service offers peace of mind that your wishes will be respected. Please ask us for more information about this service.

## Other services

Our Private Client specialists can also offer advice on the following:

- Estate Management (Probate)
- Inheritance Tax Planning
- Lasting Powers of Attorney / Powers of Attorney
- Wills and Probate Disputes

Hodge Jones & Allen LLP also has specialist legal teams in Civil Litigation, Family Law, Personal Injury and Clinical Negligence compensation claims, Criminal Defence, Housing Law and Civil Liberties / Public Law.

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