

CHILD & CHILD

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WILL INSTRUCTION FORM

In order that we may prepare a Will which suits your circumstances, we should be grateful if you could complete as much of this questionnaire as possible. Please continue on a separate sheet if necessary, indicating the section to which the information relates. Copies of existing Will(s) and other relevant documents should be provided, if possible, or at least details thereof.

## 1. PERSONAL DETAILS

1.1 Name	
1.2 Address	
1.4 Home telephone number E-mail address Fax number	
1.5 Occupation	
1.6 Date of Birth	
1.7 Country of Birth and Country of Residence	
1.8 Location and details of any previous Will	
1.9 Do you have any Pre or Post Nuptial Arrangements?	
1.10 Marital Status (please circle ones which apply)	
Single	Married
Divorced	Separated
Partner	Remarried
Details of your other key advisors: Financial Advisor Accountant Wealth/Investment Manager	

## 2. DETAILS OF ANY SPOUSE/PARTNER

2.1 Name	
2.2 Address	
2.3 Country of Birth and Country of Residence	
2.4 If you are not married, are you planning to marry in the near future?	
2.5 Has s/he made a Will?	
If Yes please provide details	If No, do you want to make wills together?

## 3. DETAILS OF ANY CHILDREN

Under "Status" please state whether each child is natural/adopted/step child/illegitimate.

Full name	Address	Date of Birth	Status

## 4. DETAILS OF ANY GRANDCHILDREN

Full name	Address	Date of Birth	Status

## 5. DETAILS OF YOUR ESTATE

	Brief Details	Value of your share	Value of your spouse's / partner's share
5.1 Main Residence (Mortgage outstanding) Location of Deeds			
5.2 Stocks & Shares			
5.3 Unit Trusts			
5.4 Bank accounts			
5.5 Building Society accounts			
5.6 National Savings accounts/ Premium Bonds			
5.7 Life Policies Sole or Joint Life Linked to mortgage?			
5.8 Business/ Agricultural Property (A meeting is recommended to discuss this further)			
5.9 Investment Bonds or Policies			
5.10 Foreign Property			
5.11 Property in trusts in which you are a beneficiary or a trustee			
5.12 Pension Benefits e.g. Death in Service Life Assurance			
5.13 Lifetime gifts, to whom and when made			
5.14 Other Land/Buildings			
5.15 Personal Possessions			
5.16 Other Assets			

	Value of the State	£	£	
5.17 Joint Assets Do you own any assets jointly with anyone else? If so please provide details and values:				
5.18 Gifts Have you made any large gifts in the past 10 years? Please provide details.	Name of Recipient	Amount of Gift	Date of Gift	
5.19	Income	Source of Income	Current Annual Income	
	Salary			
	Dividends			
	Savings and Investments			
	Property Income			
	Trust Distributions			
	Foreign income			
	Total Annual Income		£	
	Total Annual Tax Bill		£	
Employment Status	Employed	Self Employed	Other:	
Are you interested in lowering the amount which you pay in taxes?			yes      no	

## 6. CONTENTS OF WILL

Funeral Arrangements  
Burial/Cremation  
Organs for donation

## 7. PARTICULARS OF EXECUTORS

These are the people who will carry out your wishes and administer your estate. This can be a complicated and responsible task and it is therefore suggested that you appoint at least two and perhaps a professional.

	Full Name	Address	Relationship
7.1 1 <sup>st</sup> Executor			
7.2 2 <sup>nd</sup> Executor			
7.3 3 <sup>rd</sup> Executor			
7.4 4 <sup>th</sup> Executor			

## 8. PARTICULARS OF GUARDIANS

You are advised to appoint guardian(s) to look after your children who are under 18. The appointment usually takes effect if both you and your spouse die. The position is different if you are an unmarried father in which case you may require further advice. We normally advise that these are different to your Executors.

Full Name	Address	Relationship

## 9. SPECIFIC GIFTS (E.G. CASH, JEWELLERY, HOUSE CONTENTS, REAL PROPERTY ETC.):

The main part of your estate is called "the residue" (see section 11). Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, and friends or to charities.

These are gifts of money or objects that you wish to make to a particular person. These objects will not pass with the balance of your estate. If you are planning to leave all of your assets to a single person you do not need to make specific gifts and should go direct to section 11.

You can leave all of your personal effects and chattels to your executors and trustees with a request that they should distribute them in accordance with a letter you write. Please say YES or NO here if you wish this to be included. YES/NO

If you intend to leave a gift to any Executor or Guardian please indicate in the following sections whether the gift is conditional on them accepting the appointment.

	Full Name	Address	Relationship
Business or Agricultural Property			
Other Items (Jewellery, antiques, etc.)			
Public/Private Company shares			
Gift of a share of your house or flat			

## 10. GIFTS OF MONEY

Beneficiary	Age	Address	Amount

Are the recipient beneficiaries to bear any Inheritance Tax, or is it payable out of the residue?

## 11. THE BALANCE (OR RESIDUE) OF YOUR ESTATE

This is all that you own except jointly owned property and any gifts made in sections 9 and 10. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, then those children (your grandchildren) will inherit their parents share. Boxes 11.1 to 11.4 are the more common provisions made. If you wish to use one of these tick the appropriate box; if not please go to question 12. If the balance is to be shared between a number of people please indicate in section 12 the share each person is to receive keeping in mind all percentages should add up to 100 and all fractions to one. You can name as many or as few people as you wish.

We can make the gift in the form of a Trust where the beneficiary receives interest but capital only at the discretion of the trustees. This can protect the estate and we can discuss this with you. Please indicate if this is of interest? YES/NO

11.1	Everything to my spouse/partner, but if s/he has died then to my children equally	
11.2	Everything to my children named at question 3 above, equally and any other children of mine not yet born	
11.3	What age would you like your children to benefit? Choose from 18,21 or 25 -	
11.4	If my spouse/partner and children all die before me or if questions 11.1 and 11.2 do not apply, to those mentioned below:	

Name and Address of Beneficiary/Charity	Share of Residuary Estate (%)



If any of the people mentioned above die before you, would you want his/her share to be divided equally among the others?	Yes	No
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## 12. CATASTROPHE CLAUSE

If all of the people mentioned in your Will predecease you, who would you want to inherit your estate?

## 13. ADDITIONAL COMMENTS OR RELEVANT INFORMATION

Please provide us with a copy of any existing Will(s) including any foreign Will(s) or testamentary documents. (Many clients with foreign Wills do not realise that a standard revocation clause may revoke any foreign wills, which could be problematic.)

Please let us know how you heard of Child & Child:

Continuation Notes: Please add here any further information relevant to your estate:

Continuation Notes:

## GENERAL NOTES

- A Will is usually cancelled if you marry or enter into a Civil Partnership after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
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- On divorce gifts to your husband/wife/civil partner are cancelled as is his/her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
- If you are not making any provision for a husband/wife/partner, or a former husband/wife/partner, it is possible for him/her to make a claim against your estate. If you think this applies please seek further advice from us.
- Please note that illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children. Children excluded from your Will may have a right to claim a share of your estate in certain circumstances. Please ask for advice, if appropriate.
- A Will is an important document and it should only be prepared with careful consideration of all the facts and a meeting or a discussion by telephone is recommended. Please feel free to ask for our help or advice or extra information on any topic related to your Will during your appointment.
- Many clients who have joint tenancy assets do not realize that these will not pass under the terms of their Wills, passing automatically to the joint tenant instead. Severance of the joint tenancy may therefore be necessary to give effect to the client's wishes.
- When you visit us please bring some form of identification preferably in the form of your passport / driving license and 2 recent utility bills confirming your address.
- If you need help completing this form please feel to contact us. Once you have completed this questionnaire please return it to us to enable us to arrange a meeting or telephone call. Please quote the name of your Wealth Lawyer when contacting us. Alternatively, simply ask for someone in the Private Wealth Team.

### **Private Wealth Team**

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