

RISBYGATE SOLICITORS – WILL QUESTIONNAIRE

To ensure your Will does what you want, there are a few questions for you to answer. They have been kept as simple as possible, so do feel free to put further detail on a separate sheet if necessary. Please include full names and addresses so far as possible.

The form looks far worse than it is, so please do not be put off.

1. YOUR STATUS

It is important for us to know if you are intending to get married, or if you are intending to get divorced, as both affect the preparation of your Will. Please state here if either of these apply to you.

2. FUNERAL WISHES

Do you want to give any instructions about funeral arrangements (for example – Cremation, burial, woodland burial, or donation of organs)? If so, write them here.

3. EXECUTORS

Who would you like to be your Executors (the person or persons responsible for carrying out the terms of your will)?

People who benefit under your will can be appointed (eg – spouse or adult children).

The maximum number is 4, but it is recommended to have at least 2. You can appoint substitute executors who will act if, for any reason, an executor is unable or unwilling to act as executor.

Executors:

(1) Name
Address
Relationship to you

(2) Name
Address
Relationship to you

(3) Name
Address
Relationship to you

(4) Name
Address
Relationship to you

Substitute executors:

(1)

(2)

4. GUARDIANS

If your own children are under 18, please specify who you would like to be their guardians or guardian, if they are still under 18 when you die.

Generally speaking the appointment will only take effect when both you and the child's other parent have died.

(1) Name
Address
Relationship to you

(2) Name
Address
Relationship to you

5. SPECIFIC GIFTS

You may wish to include specific gifts of personal items (eg – jewellery)

It is popular to leave a generic gift to Executors with the request that they distribute items in accordance with a list you prepare.

If you wish to gift by reference to a List, tick here

Name
Item
Address

Name
Item
Address

Name
Item
Address

Name
Item
Address

(continue on separate sheet if necessary)

SPECIFIC GIFT OF INTEREST IN HOUSE OR FLAT

This is beyond the scope of the wills by post service.

6. CASH GIFTS

These can be gifts of cash to individuals or to charities, clubs or other groups.

Name

Address

£.....

Name

Address

£.....

Name

Address

£

Name

Address

£.....

7. RESIDUE

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

This is up to you, but you may consider:

Gifts to spouse/partner

Gifts to children, or grandchildren (at 18, 21 or 25 if young?)

Gifts to other relatives or charities as a default.

The most common arrangement for couples is:

All residue to spouse/ partner

If spouse/partner has died, then to children (at 21),

but there are many more variations.

Please write your wishes for residue here:

8. SIGNING UP

Are you able to attend our office at 101 Risbygate Street, Bury St Edmunds, Suffolk, IP33 3AA to sign the will?

YES/NO (please delete as necessary).

PLEASE CHECK THE FORM CAREFULLY, THEN PLEASE SIGN AND DATE IT.

YOUR SIGNATURE

DATE

PLEASE RETURN ONE QUESTIONNAIRE FOR EACH PERSON MAKING A WILL.

To: RISBYGATE SOLICITORS
101 RISBYGATE STREET
BURY ST EDMUNDS
SUFFOLK
IP33 3AA

RISBYGATE SOLICITORS