

# VANDERPUMP & SYKES

SOLICITORS

## WILL INSTRUCTION QUESTIONNAIRE

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Private Client  
Matrimonial  
Litigation  
Conveyancing  
Commercial  
Notary

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<input type="checkbox"/>

**(A) GENERAL INFORMATION**

**1. YOUR FULL NAME (include your title and any aliases) :**

ADDRESS: \_\_\_\_\_

TEL NO: \_\_\_\_\_

Home: \_\_\_\_\_

Work: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

**2. PARTNER'S FULL NAME (include title and any aliases):**

ADDRESS: \_\_\_\_\_

*(If different from  
the above*

TEL NO: *(If different from the above)* \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

IS YOUR PARTNER YOUR SPOUSE OR CIVIL PARTNER?

YES

NO

**3. ARE YOU DIVORCED?**

YES

NO

**HAVE YOU HAD A CIVIL PARTNERSHIP DISSOLVED?**

YES

NO

**ARE YOU A WIDOW(ER)?**

YES

NO

**4. DO YOU HAVE CHILDREN?**

If yes, please give details overleaf – including adopted children.

YES

NO

**5. IS THERE AN EXISTING WILL ...**

(a) For you?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
YES	<input type="checkbox"/>	NO	<input type="checkbox"/>

(b) For your partner?

If yes, where are they kept?  
.....

**CHILDREN'S DETAILS**

1. NAME : .....

ADDRESS: .....

AGE: .....

2. NAME : .....

ADDRESS: .....

AGE: .....

3. NAME : .....

ADDRESS: .....

AGE: .....

4. NAME : .....

ADDRESS: .....

AGE: .....

5. NAME : .....

ADDRESS: .....

AGE: .....

**6 IS ANY CHILD ...**

a. from a previous relationship?

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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b. adopted?	YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
c. a step-child?	YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
d. subject to a "residency order"?	YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
e. in the care of another person who may or may not have a residency order?	YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
f. Is any child's natural parent (other than detailed above) living?	YES	<input type="checkbox"/>	NO	<input type="checkbox"/>

**7. GUARDIANS – FOR CHILDREN UNDER 18 YEARS**

Your Guardians will be responsible for bringing up your children.

Please specify two and their relationship to you (if any)

For reasons, which may be explained, try and ensure you do not appoint the same people as both Guardians and Executors (See 8 below).

a. Name: .....

Address: .....

Occupation: ..... Relationship: .....

b. Name: .....

Address: .....

Occupation: ..... Relationship: .....

Is there anyone who has been appointed by the Court as having "Parental Responsibility" for any child?

YES  NO

**8 EXECUTORS**

Your Executors will be responsible for collecting and securing your assets, paying your debts, funeral expenses and any tax and, for distributing your estate in accordance with the terms of your Will.

A husband and wife/civil partner's will usually appoint each other and on the death of the survivor of them appoint two other persons. Your children who are adults may act. You will need to have at a minimum of two Executors will if there are minor beneficiaries.

a. Name: .....

Address: .....

Occupation: ..... Relationship: .....

b. Name: .....

Address: .....

Occupation: ..... Relationship: .....

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**9. DOMICILE / RESIDENCY - General Notes**

UK residents are liable to UK Income Tax on UK and foreign income.

- Non UK residents are subject to Income Tax only on the income arising in the UK and not that abroad.
- If you are resident in the UK but not domiciled in the UK then you pay tax on foreign income only in so far as it is brought into the UK.
- Residence and Ordinary Residence – the requirements laid down by the Revenue to determine whether or not you fall into either definition are complex and regrettably beyond the scope of this note.
- Domicile - is where you have your permanent home (i.e. your place of birth). Your domicile may effect taxes payable in the event of your death.

(a) Where are you resident for Income Tax purposes? .....

(b) Where is your country of domicile? .....

(c) To where do you intend to retire? .....

(d) Is the Property to be covered by this Will..... .....

(i) Worldwide .....

(ii) UK only .....

(iii) Other specifically .....

Please note – Your Will may not be effective to pass property which you own which is located outside England and Wales. We do not offer advice on foreign assets as part of our standard Will drafting service. If you inform us that you own property abroad and that you require advice in relation to it, we will either provide such advice for an additional fee or we will direct you to alternative specialist advice.

**(B) SPECIFIC ISSUES – Please give brief details**

**10. DO ANY OF THE FOLLOWING AFFECT YOU?**

a. IS YOUR ESTATE WORTH MORE THAN £325,000.00?

YES

NO

Please note – It is possible that your estate will be subject to Inheritance Tax on your death and that the amount of tax charged will depend on the nature of the provisions contained in your Will. For this reason, advice on Inheritance Tax is commonly a feature of a comprehensive Will drafting service unless expressly excluded.

We will advise you as to the likely Inheritance Tax consequences of the provisions which you have asked us to include in your Will on the basis of the information which you have given to us. However, we will not advise you as to the most efficient method of drafting your Will or give advice in lifetime planning as part of our standard Will drafting service. However, if you ask us to do so we will provide such advice for an additional fee.

b. ARE ANY OF YOUR BENEFICIARIES MENTALLY IMPAIRED?

Please state their name(s) and age(s).

YES

NO

c. IF YOU ARE DIVORCED / SEPARATED / PREVIOUS CIVIL PARTNERSHIP.

Have your financial affairs been sorted out?

YES

NO

d. IF YOU HAVE CHILDREN FROM A PREVIOUS RELATIONSHIP.

Are you keen to protect their interests?

YES

NO

e. DO YOU HAVE ANY DEPENDENTS OTHER THAN CHILDREN?

E.G. Your Spouse, Former Spouse, Civil Partner, Former Civil Partner, Co-Habitee, Elderly Relatives

YES

NO

f. ARE THERE ANY DEPENDENTS YOU DO NOT INTEND TO PROVIDE FOR IN THIS WILL?

YES  NO

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Please note – The Inheritance (Provision for Family and Dependents) Act 1975 may enable certain persons to seek additional provision out of your estate after your death. If an application is made under this act it is likely to involve your estate in expense and may result in a variation of the dispositions made in your Will.

If the information which you provide to us for the purposes of preparing your Will suggests that there is a real risk of such an application being made in respect of your estate, we will advise you that this is the case. However, we will not offer more detailed advice in relation to the 1975 Act unless you ask us to do so and, in those circumstances, an additional fee will be charged.

g. DO YOU HAVE CREMATION / BURIAL WISHES? - if so, please give details

YES  NO

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h. DO YOU WANT THE COST OF ANY MEMORIAL TO BE PAID FOR OUT OF YOUR ESTATE?

YES  NO

**LIST OF ASSETS**

Please include any Properties, Bank Accounts, Investments, Pensions, Life Assurance Policies, Interests in Trust Funds etc.

Please also list any substantial gifts to others made within the last 14 years.

**Held in your name only:**

**VALUES £**



**Held Jointly (i.e. in your name and the name of another):**

**VALUES £**



Please Note – In order for our firm to be able to prepare your Will, you must provide us with details of the nature and extent of the property which you own. It is your responsibility to ensure that the information which you provide to us is accurate and up to date.

**(C) WHERE DO YOU WANT YOUR ESTATE TO GO?**



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**11. SPECIFIC GIFTS e.g. jewelry, property, shares**

Please ensure you provide full and accurate descriptions. If there is confusion on your death, the gift may fail for uncertainty.

A Beneficiary is the person you would like to receive the gift.

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<b>Item</b>	<b>Full name &amp; address of Beneficiary and age at which they are to inherit</b>	<b>Is gift to be free of/subject to tax/mortgage?</b>

Ask yourself:-

- (a) Do you want all of these gifts to occur on your death, or after the death of your spouse / partner?
- (b) Has any gift been sued as a security for a loan and if so is it given free of that loan?

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**12. LEGACIES i.e. a sum of money**

<b>Amount £</b>	<b>Full name &amp; address of Beneficiary and age at which they are to inherit</b>	<b>Is gift to be free of/subject to tax/mortgage?</b>

**13. REMAINDER OF YOUR ESTATE**

This is everything that is left after the payment of your debts etc and of the specific gifts and legacies given in 11 & 12 above.

- a. Do you want the remainder of your estate to go to your spouse / partner / civil partner?

YES  NO

b. If not, where do you want it to go? To your children, in what shares and at what age?  
Other relatives? Friends?

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c. If those in (a) & (b) above predecease you, where do you want it go?  
If a child had predeceased you leaving children of their own (your grandchildren) do you want  
that child's share to be split between their children? If so in what shares and at what age?

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d. If none of the above survive you where do you want it to go? Charities?

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**PLEASE SIGN**

I have given the relevant information you need to know to make a suitable Will for me.

I understand that if I have any special requirements you will be willing to offer this at an additional charge.

Please prepare a Will for me based on the information I have given.

*When the instructions are joint would each person please sign*

*Signed* \_\_\_\_\_

*Signed* \_\_\_\_\_

**Please return to Vanderpump & Sykes LLP**

**PLEASE PUT BELOW ANY QUESTIONS YOU MAY WISH TO ASK**

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Please tick the appropriate boxes to indicate whether you would like to receive newsletters and other information by e-mail on any of the following topics:-*

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