

The information on this form is confidential and once received by us, it will not be divulged to anyone other than the partners and staff of Morrisons Solicitors involved with the preparation of Wills.

The questionnaire is designed to help you consider some of the points you should think about in connection with your Will.

It will greatly assist us in preparing your Will if you answer all questions in full. We strongly recommended that you keep your Will in a safe place. We shall be happy to keep your Will and other important documents in our deeds store on your behalf. We do not charge for this service.

1. Your personal details

Your full name including title and all forenames:

Any other names by which you may be known:

Date of birth:

Country of birth:

Nationality:

Marital Status/Civil Partnership:

Occupation:

Correspondence address:

Home telephone number:

Work telephone number:

Mobile telephone number:

Email address (If suitable for confidential correspondence):

Do you already have a Will in the UK or abroad?

If so, please state where this is held:

2. Your partner's personal details

Your full name including title and all forenames:

Date of birth:

Country of birth:

Nationality:

Please note that if you get married your existing Will becomes ineffective unless reference to the marriage is included in the Will.

If you are intending to be married/register your civil partnership please tick here:

Please tick:

Co-habiting

Married

Civil Partnership

Divorced

Widowed

Occupation:

Correspondence address (If different from your own):

Home telephone number:

Work telephone number:

Mobile telephone number:

Email address (If suitable for confidential correspondence):

Does your Partner already have a Will in the UK or abroad?

If so, please state where this is held:

3. Your children

Please indicate whether adopted children are included

Full name including title and all forenames:

Full name including title and all forenames:

Date of birth:

Date of birth:

Address:

Address:

Full name including title and all forenames:	Full name including title and all forenames:
Date of birth:	Date of birth:
Address:	Address:

4. Your partner's children

Please indicate whether adopted children are included

Full name including title and all forenames:	Full name including title and all forenames:
Date of birth:	Date of birth:
Address:	Address:
Full name including title and all forenames:	Full name including title and all forenames:
Date of birth:	Date of birth:
Address:	Address:

5. Other information about you and your partner

Is there any other information not already covered that we should know about? This could include information about your health, the needs of your family (for example a child with learning or physical disabilities or and elderly relative).

8. Your liabilities

	Nature of liabilities	In your name Approximate values	Partners name Approximate values	Jointly owned Approximate values
Mortgage				
Other				

9. Benefits of trusts

Are you or your partner/civil partner/spouse a beneficiary or trustee of a trust?

Yes

No

Please provide details:

10. Lifetime gifts

Have you made any gifts of money or other assets totalling more than £3,000 each year in the last 7 years?

Yes

No

11. Your executors

Executor A	Executor B
Name:	Name:
Address:	Address:
Relationship to you and your partner:	Relationship to you and your partner:

Would you like the firm to act as your Executors?

Yes

No

12. Your funeral wishes

Would you prefer to be cremated or buried?

Do you have any specific requests in relation to cremation or burial?

Would you like to donate any of your organs?

13. Guardians for your children

Guardian A

Guardian B

Name:

Name:

Address:

Address:

Relationship to you and your partner:

Relationship to you and your partner:

14. Your estate - gifts

Do you wish to leave specific items, property or cash to certain beneficiaries?

Yes

No

If so, please provide details below:

Please describe item or state the amount of cash:

Name of beneficiary:

Age:

You can include a clause in your Will that asks your executors to refer to a letter of wishes left by you in which you make gifts of specific items of your household furniture, personal effects and jewellery (your chattels) but not money. This letter can be amended as often as you like without incurring the expense of changing your Will. Please note that your wishes would not be legally binding.

Would you like to do this?

Yes

No

15. Your estate - the residue

Residue is what is left over when your debts, taxes, administration costs, and legacies of money have been paid and any specific items given.

If you are not providing for a partner/civil partner/spouse or children please go to 15.4

15.1

Do you wish to leave your entire residue to your partner/civil partner / spouse? Yes No

If you ticked 'Yes' please go to 15.2

If you ticked 'No' please go to 15.3

See section 6 about inheritance tax

15.2

If so, outright? Or with limited access to capital?

On the death of your surviving partner/civil/partner spouse, do you wish to divide your residue between your children in equal shares? Yes No

If so, on reaching the age of: 18 21 35 other age no specific age

If you ticked 'No' please go to 15.4

15.3

If a child dies before you, do you wish their children to inherit their share? Yes No

If you want to know what should happen if none of your children/grandchildren survive, please go to 15.4

15.4

Otherwise, who would you like to benefit and in what proportion?

Lifetime gifts

Please give details below of any family members or other people who are financially dependent on you but who you are not including in your Will:

Name	Reason

Lasting Powers of Attorney (LPAs)

If you lose capacity to deal with your finances or health affairs your family or close friends will not be able to deal with matters for you without making an expensive and time consuming court application. To prevent this, you can sign an LPA to appoint someone you trust to deal with your property and affairs and/or welfare and healthcare decisions.

We would be happy to assist you with this should you wish to proceed.

STAY UP TO DATE

We produce regular newsletters and events which provide updates and insights into topics that affect our clients. If you would like to receive these by email to the email address provided above, please tick the relevant box(es) below:

Private client update (A quarterly update on topics of interest to individuals and their families. Occasional invitations to relevant seminars and events)	<input type="checkbox"/>
Corporate Insights (Monthly newsletter on topics affecting businesses and invitations to relevant seminars on business topics.)	<input type="checkbox"/>
Employment law update (Regular updates and seminars focused on employment law)	<input type="checkbox"/>
Property matters (Regular updates on developments relating to the property sector)	<input type="checkbox"/>
Networking events (Invitations to relevant networking events in and around our key locations)	<input type="checkbox"/>
I do not want to receive any marketing materials or communications.	<input type="checkbox"/>

You can unsubscribe at anytime by clicking the “unsubscribe” link on any of our newsletters, updates or invitations, or by emailing marketing@morrlaw.com

You can also keep up to date by reading news and updates on our website www.morrlaw.com/news-and-insights

We take your data very seriously. You can view our Privacy Policy on our website - www.morrlaw.com/comprehensive-privacy-policy

Please return this form when completed to Morr & Co LLP, you can email the form to info@morrlaw.com or post to your preferred office address.

You can find the full list of our office addresses at www.morrlaw.com/locations.