

Will Questionnaire

We will use the information provided below to establish what will type is suitable for your circumstances. We will discuss with you, if we are able to suggest potential tax savings.

1. You

Title: Mr/Mrs/Ms/ Other _____

Full Name including any middle names _____

Address _____

_____ Postcode _____

Telephone Number _____ Mobile _____

E-Mail address _____ Date of Birth _____

Are you known by any other names? If so please detail _____

Marital Status Single Engaged Married Divorced Widowed
 Separated Remarried Civil Partnership

Are you a permanent resident in England or Wales? Yes No

Do you have an existing Will? Yes No

2. Your Spouse or Partner

Title: Mr/Mrs/Ms/ Other _____

Full Name including any middle names _____

Address _____

_____ Postcode _____

Telephone Number _____ Mobile _____

E-Mail address _____ Date of Birth _____

Are you known by any other names? If so please detail _____

Marital Status Single Engaged Married Divorced Widowed
 Separated Remarried Civil Partnership

Are you a permanent resident in England or Wales? Yes No

Do you have an existing Will? Yes No

3. Children

* Whether the child is from this relationship, a previous relationship, or other circumstances.

Full Name	Address	Date of Birth	Status*

4. Guardians

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

Full Name	Address	Relationship to you

5. Funeral Wishes

Do you have any particular funeral wishes? _____

Buried Cremated No preference

Do you have an existing funeral plan? If so please provide details _____

6. Choice of Executors

You must appoint executors to carry out the instructions in your Will (to administer and distribute your estate. You may wish your husband/wife/partner to be your only executor but you should also name other executors to act if he/she is unable to do so. It makes sense to choose someone younger than you (although over 18 years of age) and in good health. Normally there are one or two executors, but you can appoint up to four.

Many people appoint the solicitors who prepare their will as their executors rather than relatives as those suffering a personal loss may find it difficult to act in such circumstances. We will be pleased to act as your executors, either alone or with a member of your family or friend. We will provide your estate with a first class value for money service to ensure that your beneficiaries receive their entitlement at the earliest opportunity. Your estate would our professional fees.

List below up to four chosen executors and whether you wish them to act only if a previously chosen executor has died:-

Full Name	Address	Relationship to you

Please tick here if you wish for PM Law Solicitors to act as your executors in the event any of the above are unable to act as your executor

8. Bequests

Specific items e.g. cars, ornaments, jewellery. List the names and addresses of individuals, organisations and charities (Please include the charity number) to whom you would like to make a specific gift.

If a gift is to a child, at what age should he or she receive it? 18 21 25 other

Name	Date of birth if a child	Address	Description of item

Gifts of Money. List the names and addresses of individuals and charities (Please include the charity number) to whom you would like to leave a specific sum of money.

If a gift is to a child, at what age should he or she receive it? 18 21 25 other

Name	Date of birth if a child	Address	Amount

Residuary bequests (a percentage or all of the remainder of your estate). The residue of your estate, which may be the bulk of your estate, is what remains after payment of any debts, taxes and the gifts, which you have listed above. You may now consider who will receive the residue of your estate. Please state below who is to receive the residue on your death and who is to receive it if they die before you. Will it be your spouse/partner, your child or a charity? 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, those children (your grandchildren) will inherit their parent's share. The possibilities are endless, but we have identified 3 most common ways of dealing with the residue of an estate. Read them carefully and choose one which is best suits you. If you are in doubt, call or e-mail us.

If you wish to use one of these ring the appropriate option; if not, please see below.

- Everything to my husband/wife/partner named at question 2, outright, but if he/she has died then to my children named at question 3, equally;
- Everything to my children, named at question 3, equally at the age of? 18 21 25 other
- To my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/organisation(s) named in the space below. If not in equal shares, then show the share each it to take

IF NONE OF THE ABOVE CHOICES ARE APPROPRIATE

Please set out below who is to receive the residue and if more than one person or organisation is involved, in what shares?

List the names and addresses of individuals, organisations and charities (Please include the charity number) to whom you would like to leave the residue.

If a gift is to a child, at what age should he or she receive it? 18 21 25 other

Name	Date of birth if a child	Address	Amount or Percentage

In the event of a tragedy and all of the proposed beneficiaries chosen in your Will, die before or at the same time as you, what provisions would you like for the residue of your estate.

If a gift is to a child, at what age should he or she receive it? 18 21 25 other

Name	Date of birth if a child	Address	Amount or Percentage

DECLARATION

Please ensure that you complete and sign this declaration and then return the completed form to PM Law Ltd in the enclosed pre-paid envelope.

Please prepare a will for me based on the instructions contained in this form. This was completed by me/on my instructions by (delete as appropriate) _____(Name)

I understand that:

- The information requested in this form is required for the purpose of preparing my will and to ensure that my will reflects my wishes and is appropriate for my circumstances.
- The information is to be used by PM Law Ltd who are responsible for preparing the will.
- PM Law Ltd may contact me to confirm my instructions.
- Information about me will be put on the database of PM Law Ltd and used by PM Law Ltd in servicing my relationship with them and monitoring quality of service.
- PM Law Ltd will charge for its services for acting as Executors (If appointed) after my death in accordance with its scale of fees. I certify that the information given in its form is true and complete and correctly represents my wishes.

- An additional charge will arise after your will has been prepared, should you make any alterations to your wishes that necessitate PM Law Ltd re-drafting your will. Please therefore carefully check that this form does reflect your wishes and nothing has been left out.
- PM Law Ltd reserve the right to make an additional charge if the nature of the instructions are such that time over and above what they would consider to be a reasonable time for preparing a will is explained in completing your will. You will be advised of the estimate additional charge before any work is undertaken.
- Your details are held by PM Law Ltd who is the data controller.
- You have the right of access to your personal records held on our files by written request to PM Law Ltd, PM House, 250 Shepcote Lane, Sheffield, S9 1TP

KEEPING YOUR INFORMATION

PM Law Ltd may use the information on this form to provide you with details of selected products and services by post or by telephone. If you do not want this, please tick this box

By providing your email and /or mobile telephone number below, you are agreeing to receive offers or communications by email or mobile/SMS from PM Law Ltd and/or our employees and agents.

Email Address _____

Mobile Telephone Number _____

GIVING YOUR CONSENT

It is important that you read this page carefully as, by signing this form, you agree that we can use your information in this way.

Please note that if you tick the box above and do not provide either an email address or mobile telephone number, we will not be able to tell you about the additional benefits available to our customers.

Signed _____

Date _____

GENERAL NOTES

A Will is usual completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.

On divorce, gifts to your husband/wife 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 that he/she could make a claim against your estate. If this does apply please seek further advice from us.

Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment.

We also offer advice and assistance with: Conveyancing, Employment Law, Landlord Tenant Law, Dispute Resolution and Personal Injury. Call us for more information on 0114 296 5444.

