

Will Questionnaire

This questionnaire is for the use of Simcocks only and is a non-exhaustive guide of the issues to be covered in taking Will instructions. There may be information requiring inclusion on issues which are not covered in this questionnaire. A space is provided at the end of this document for this purpose.

Please refer to the back of this document for guidance notes on the completion of this questionnaire.

1	Full Name (and any aliases used)
2	Address
3	Contact telephone numbers
4	Occupation
5	Have you already made a will? If so, please provide details as to where it is held and when it was made
6	If non Manx born , please provide details of the date you moved to the Isle of Man and details of your former domicile
7	Details of any specific burial / cremation wishes (Manx domiciles only)
8	Marital status If not married, do you intend to marry in the near future?
9	Names of executors/trustees
	Name
	Address
	Relationship
	Name
	Address
	Relationship
	If more than two, please add details in the "General Information" section at the end of this form

10	Details of substitute trustees in the event that your first chosen trustee(s) predecease you (please provide details as to whether the substitute trustees are to act jointly with the survivor)	
	Name	
	Address	
	Relationship	
	Name	
	Address	
	Relationship	
11	If you have children please provide details of guardians for your children until they attain the age of 18	
	Name	
	Address	
	Name	
	Address	
12	Specific gifts. Please insert details below of any specific gifts (eg jewellery, car) and any gifts of money you wish to make	
	Name	
	Address	
	Description of Gift	
	Name	
	Address	
	Description of Gift	
	Name	
	Address	
	Description of Gift	
	If more than three, please add details in the "General Information" section at the end of this form	
13	Description of how estate is to be distributed (please only select one)	
	<input type="checkbox"/> All to spouse but if spouse pre-deceases then all to children when attaining 18 / 21 / 25 years in equal shares (specify age at which child / children are to benefit)	
	OR	
	<input type="checkbox"/> All to spouse for life (spouse to have income) and then to children at 18 / 21 / 25 (specify which) in equal shares when spouse dies	
	If you have ticked either, please provide details of:	
a	Name of spouse and address (if different from your address)	

b	Name of child and address (if different from your address)	

	Current age of child	Age at which they are to inherit

c	Name of child and address (if different from your address)	

Current age of child		Age at which they are to inherit
OR		
() All to named persons in equal shares <u>or</u> in different proportions (state exact wishes)		
a	Name	
	Address	
	Amount / proportion	
b	Name	
	Address	
	Amount / proportion	
c	Name	
	Address	
	Amount / proportion	
If more than three, please add details in the "General Information" section at the end of this form		
Details if any beneficiary predeceases you / alternative beneficiaries		

OR		
() To be held by the executor(s) as trustees upon a discretionary trust (insert names of potential beneficiaries)		
a	Name	
	Address	
b	Name	
	Address	
c	Name	
	Address	

Guidance notes for the completion of questionnaire

Question number 9 asks you for details of the executors/trustees who will be appointed to administer your estate upon your death. It is advisable to make provision for substitute trustees to act, in the event that your trustees predecease you or are unable to act as trustees.

Your trustees will administer your estate in accordance with the provisions contained within your will. They will pay out and distribute any specific gifts (see question 12) and then collect in and, if appropriate, sell the remainder of your assets (this will be your residuary estate). Your residuary estate will then be distributed to the beneficiaries chosen by you in accordance with the terms of your Will (see question 13).

Question 13 provides you with various alternatives as to how your residuary estate should be distributed. Please provide full details of all beneficiaries and the share of interest you would like them to take in residuary estate. Again, you may wish to consider substitute beneficiaries, in the event that any of your beneficiaries die before you.

Full names and addresses of beneficiaries must be provided in order for us to prepare the first draft of your Will, together with the current ages of any children to benefit and the age at which such children will be entitled to their respective share of your estate.

You will note that there is a space at the end of the form for General Information. Please list in this space any further information arising from any of the questions and please continue on an additional sheet, if necessary. Please make sure that you refer to the question to which the information relates and please feel free to make a note of any queries or concerns relating to your Will.

Once you have filled in the questionnaire, please return it to us (by fax or post) or bring it in with you when attending the office for your meeting.

Please return to:

Simcocks Advocates
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