

## Will writing and estate planning services

Paul Austen Associates Ltd is licensed for the reserved legal activity of non-contentious probate and provides a professional Will writing service for new and existing clients to ensure a complete service that considers all of the taxes, all of the time. We ensure that your business is properly catered for in your will so that any value from it may be maximised by your executors on behalf of your chosen beneficiaries. We include an Executor service to assist with the Probate process and carrying out of your wishes. Please complete the confidential questionnaire to enable us to prepare your Will to your exact requirements. This questionnaire has been compiled to cover most requirements and this is included free of charge in your annual package as we believe a complete service cannot be offered without it. If your requirements are outside of this, we can still provide the service although there may be an additional cost. Please ring 01260 281106 to obtain further guidance.

The information you provide will constitute our instruction for drawing up your Will. The draft Will is then returned to you for approving before signing and witnessing. You can do this in person at our offices (we will provide the witnesses) or we can post the Will to you for signing and witnessing. We recommend the signed Will is then stored in our Will Safe facility free of charge.

### Completing the Questionnaire

Complete the form. You can do this by selecting from the drop down list & typing directly in to the box. If you prefer you can print the form and complete the hard copy.

**Once you have completed the form please return it to Paul Austen at Paul Austen Associates Ltd, Charter House, 7-9 Wagg Street, Congleton, Cheshire, CW12 4BA or email using the email button at the top of the form. Use the print button to save the form as a .pdf**

### Type of Will

We provide two main types of Will; Individual or Mirror. An individual Will is prepared for a single person, or for spouses/partners who have different terms under their respective Wills. A Mirror Will is two Wills prepared for spouses or partners who wish for identical but reciprocal terms, e.g. leaving everything to each other.

Which type of Will do you require

## Section 1.

## Your Personal Details

Are you an existing client of Paul Austen Associates Ltd

Surname

Full Forenames

Other names you are known by

If you are an existing client you do not need to enter information in this box.

Sex

Address Line 1.

Address Line 2.

Address Line 3.

Post Code

Tel Home

Tel Mobile

### Date Of Birth

Day

Month

Year

Nationality

Occupation

Do you expect to marry or enter into a civil partnership in the near future?

**Note:** Your Will becomes invalid if you marry or enter into a civil partnership unless your Will is made in anticipation of your marriage or civil partnership with the person named in your Will. If you answer No or Not applicable to this question and then marry or enter into a civil partnership at a later date, your existing Will becomes invalid and you need to prepare replacement Wills.

## Section 2.

## Your Spouse / Partner Details

Does this section apply to you?

### Spouse / Partner

Surname

Full Forenames

Other names you are known by

Sex

Address Line 1.

Address Line 2.

Address Line 3.

Post Code

Tel Home

Tel Mobile

### Date Of Birth

Day

Month

Year

Nationality

Occupation

Do you expect to marry or enter into a civil partnership in the near future?

**Note:** Your Will becomes invalid if you marry or enter into a civil partnership unless your Will is made in anticipation of your marriage or civil partnership with the person named in your Will. If you answer No or Not applicable to this question and then marry or enter into a civil partnership at a later date, your existing Will becomes invalid and you need to prepare replacement Wills.

Section 3.1 Details of your children

The general term 'children' (referred to as 'issue' in your Will) includes all of your natural and adopted children. This section does not include step-children unless you specifically require them to benefit under the terms of your Will (see Section 11.3).

**For Mirror Wills:** Please include details of all natural and adopted children of **each** partner from the current or any previous marriage or relationships. \*\* Please indicate which Spouse or Partner is the parent. Type 'Both' if the child is a direct descendent of both partners.

**Important: Details of all your children should be included even if you do not wish all of them to benefit under the terms of your Will.**

Number of Children

Child 1 Name  Date Of Birth  Parent\*\*

Address

Child 2 Name  Date Of Birth  Parent\*\*

Address

Child 3 Name  Date Of Birth  Parent\*\*

Address

Child 4 Name  Date Of Birth  Parent\*\*

Address

Child 5 Name  Date Of Birth  Parent\*\*

Address

Child 6 Name  Date Of Birth  Parent\*\*

Address

## Section 3.2 Grand Children

Number of Grand Children

Child 1 Name  Date Of Birth

Address

Child 2 Name  Date Of Birth

Address

Child 3 Name  Date Of Birth

Address

Child 4 Name  Date Of Birth

Address

Child 5 Name  Date Of Birth

Address

Child 6 Name  Date Of Birth

Address

Child 7 Name  Date Of Birth

Address

Child 8 Name  Date Of Birth

Address

Child 9 Name  Date Of Birth

Address

Child 10 Name  Date Of Birth

Address

## Section 4.

## Details Of Your Estate

Please provide as much information as you can about the items that make up your estate. It will help with a review of UK Inheritance Tax and also in dealing with your estate.

Main Residence		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Other Property (business & Foreign)		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Mortgages / Other Debts		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Quoted Stocks & Shares		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Unit Trusts & Insurance Bonds		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Savings Accounts (Bank, Build' Society or National Savings)		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Personal Assets Furniture, Cars & Jewellery		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Personal Assets Furniture, Cars & Jewellery		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Pensions		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Shares In Family Or Trading Companies		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>
Lifetime Gifts (To whom & when made)		Your Interest (£)	<input type="text"/>
		Spouse/Partner Interest (£)	<input type="text"/>

**Note: If you have made a substantial gift to another family member within the previous 7 years, please enter the details and the value of the gift. The value may be added to the overall value of your estate in calculating inheritance tax.**

## Section 5.

## Concerns

Are any of the following of concern to you?

Your Spouse/Partner Re-marries and leaves your estate elsewhere

The divorce of one of you beneficiaries

Inheritance tax

Your beneficiary wastes his/her legacy

Your assets being used to fund your nursing care, leaving nothing to your beneficiaries

Are there any other concerns we may try to help you with?

## Section 6.

## Executors & Guardians

### Executors

Do you wish to appoint your spouse or partner as Executors?

Do you wish to appoint a family member as an Executors or co-Executor?

**If the answer to the question above is Yes, then please provide the following**

Name of family member 1

Address

Name of family member 2

Address

Note that we will automatically appoint our company or any successor to act as professional executor in your Will for both yourself and your business as we believe we are best placed to maximise any value in your business and estate for the benefit of your beneficiaries and will be able to assist your appointed executors in handling the technical aspects. It also ensures that in the event your appointed executors are not available you will always have an executor to handle your estate.

### Guardians

Do you wish to appoint guardians for you children if they are still minor?

Name of Guardian 1

Address

Relationship to You

Name of Guardian 1

Address

Relationship to You

## Section 7.

## Current Wills

If you have any current Wills and codicils, please provide copies (if possible) and the following information. We will be happy to review these for you at no cost:

Date Of Will/Codicil	<input type="text"/>	Location	<input type="text"/>
Date Of Will/Codicil	<input type="text"/>	Location	<input type="text"/>

## Section 8.

## Funeral arrangements

In this section you may wish to indicate your preference for burial or cremation. You may also wish to indicate your preference to donate organs or your remains to medical science.

**Note:** If you wish to donate organs after your death, it is recommended you carry with you an Organ Donation Card and/or have your wishes registered on the national database

First Testor	<input type="text"/>	Do you wish your organs to be used for transplant?	<input type="text"/>
Spouse / Partner	<input type="text"/>	Do you wish your organs to be used for transplant?	<input type="text"/>

## Section 9.

## Title Deeds

**Note:** If it is a newer property or the location is unknown please type; Land Registry

Property	<input type="text"/>	Location of the Tile Deed	<input type="text"/>
Property	<input type="text"/>	Location of the Tile Deed	<input type="text"/>
Property	<input type="text"/>	Location of the Tile Deed	<input type="text"/>
Property	<input type="text"/>	Location of the Tile Deed	<input type="text"/>
Property	<input type="text"/>	Location of the Tile Deed	<input type="text"/>



**(Additional fees apply)**

Granting a Lasting Power of Attorney (LPA) is a means to ensure that your affairs are dealt with by the person(s) you choose if you become incapable of doing so yourself. There are two types of LPA (see 'Wills – Lasting Power of Attorney'). Please indicate which LPA you require. You can choose both but remember you will be required to pay additional fees for each.

Property and financial affairs LPA

Additional Information

Personal Welfare

Additional Information

This part of the Questionnaire deals with how you wish to distribute your Residuary Estate to your beneficiaries. Your Residuary Estate is the remaining estate once your Executors have paid all your debts, settled any taxes and met the costs of administering your estate and your funeral.

## Section 11. Leaving to Your Spouse / Partner

11.1 Do you wish to leave all of you Residuary Estate to your Spouse / Partner?

If the answer to 11.1 is no or not applicable please go to section 12

11.2 If your spouse or partner dies before you, do you wish your Residuary Estate to go to all your children in equal shares, including any children born in the future?

If the answer to 11.2 is no or not applicable please go to section 13

**Note:** You must consider the possibility of your spouse or partner dying before you. In this event do you wish for your children to receive your Residuary Estate (divided equally if you have more than one child)? If this is the case, answer Yes to this question. If you leave your Residuary Estate to your children in equal shares and a child predeceases you, that child's share will pass to his or her children equally.

11.3) If your Spouse or Partner has children from a previous relationship, do you wish for them to benefit to the same extent as your own children? (if they have none from previous relationship please enter not applicable)

If the answer to 11.3 is no or not applicable please go to section 15

**Note:** This question is all about step-children. Do you want step-children to be included in the definition of children? If you answer Yes to this question, all children of both partners will share equally.

11.4) Which Spouse or Partner has children from a previous relationship?

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## Section 12. Leaving to Your Children (only complete if answer to 11.1 is no or n/a)

12.1) Do you wish your Residuary Estate to go to all your children in equal shares, including any children born in the future?

If the answer to 12.1 is no or not applicable please go to section 13

**Note:** If you have children and want them to receive your Residuary Estate in equal shares, answer Yes to this question. If you leave your Residuary Estate to your children in equal shares and a child predeceases you, that child's share will pass to his or her children equally

12.2) If your Spouse or Partner has children from a previous relationship, do you wish for them to benefit to the same extent as your own children? (if they have none from previous relationship please enter not applicable)

If the answer to 12.2 is no or not applicable please go to section 14

12.3) Which Spouse or Partner has children from a previous relationship?

13.1) Do you wish your Residuary Estate to go to all members of a single category of relatives in equal shares?

If the answer to 13.1 is no or not applicable please go to section 15

If the answer to 13.1 is yes, for single Will Continue below

If the answer to 13.1 is yes, for mirror Will go to section 15

13.2) Which category of relatives

Your parents	<input type="text"/>
Your brothers and sisters	<input type="text"/>
Your nephews and nieces	<input type="text"/>
Your first cousins	<input type="text"/>
Your uncles and aunts	<input type="text"/>

**Section 14.**

**Leaving to Others**

If you wish for your Residuary Estate to be distributed unequally or between individuals not previously mentioned, or charities, please provide the following information

Name 1	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 2	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 3	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 4	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 5	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 6	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 7	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 8	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>

(\*Share – please indicate the share each person is to receive of your Residuary Estate. Express the share as a fraction, e.g. 1/3. The total of all shares must equal 1 or a percentage e.g. 33% where the total of all shares must equal 100%.)

## Section 15

## None of your beneficiaries survive you

This section is provided if you wish to make provision for dealing with the possibility of none of the beneficiaries named above surviving you. Please supply the following details of the individual(s) or charity(s) who you wish to benefit in this circumstance. If you prefer not to make any such provision, please type 'None'

Name 1	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 2	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 3	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 4	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 5	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 6	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 7	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>
Name 8	<input type="text"/>	Share*	<input type="text"/>	Address	<input type="text"/>

(\*Share – please indicate the share each person is to receive of your Residuary Estate. Express the share as a fraction, e.g.  $\frac{1}{3}$ . The total of all shares must equal 1 or a percentage e.g. 33% where the total of all shares must equal 100%.)

## Section 16.

## Specific gifts / Gifts of money

If you would like to give any specific items or amounts of money, please provide the following details

Name 1	<input type="text"/>	Address	<input type="text"/>
Description of Gift / Amount £	<input type="text"/>		
Name 2	<input type="text"/>	Address	<input type="text"/>
Description of Gift / Amount £	<input type="text"/>		
Name 3	<input type="text"/>	Address	<input type="text"/>
Description of Gift / Amount £	<input type="text"/>		
Name 4	<input type="text"/>	Address	<input type="text"/>
Description of Gift / Amount £	<input type="text"/>		

If you would like to gift anything to an Executor or Guardian, please provide the following information. If the gift is conditional on that person accepting their responsibilities please indicate this also.

Name 1  Address

Description of Gift / Amount £

Conditional?

Name 2  Address

Description of Gift / Amount £

Conditional?

**Section 18.**

**Age Considerations**

If you wish to specify the age any of your beneficiaries (named in sections 11 to 17) receive their inheritance please detail this below. This is particularly relevant with children who are under the age of 18 years at the time of your death

Name 1  Address

At what age

Name 2  Address

At what age

Name 3  Address

At what age

Name 4  Address

At what age

Name 5  Address

At what age

Name 6  Address

At what age

I/We understand that Paul Austen Associates Ltd will draft my/our Last Will & Testament from the information I/we have provided in this questionnaire.

I/We have completed this questionnaire personally and confirm that it is an accurate record of my/our testamentary wishes.

Please type your name

Date DD/MM/YY

Please type your name (Spouse/Partner)

Date DD/MM/YY

Save to your computer before printing to keep your information safe

Not a browser function

### What happens next?

Once you have returned your questionnaire to us we will be in touch to let you know when we are likely to complete the drafting of your Will.

Once the Will has been drafted we will send you a copy to review with explanatory notes. When this has been approved we will arrange for you to visit our offices for the Wills to be signed and witnessed in accordance with correct procedures or you may wish to sign and witness your Wills yourself following the instructions issued with your Will.

### Storing your Will

Once your Will has been signed and witnessed it becomes a very important document to you and your family/beneficiaries. We will store your Will at no cost in our secure Will storage facility at our offices.

If you do have any queries or concerns, please contact Paul Austen Associates Ltd on 01260 281106.