

Edmunds & Co.

S O L I C I T O R S

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jon@edmunds-co.com

Wills via Post

Thank you for downloading our Will Questionnaire Form.

We have tried to make the questionnaire as straightforward as possible, if at any time you are unsure of anything please call or email us on wills@Edmunds-Co.com and we will help you where appropriate.

Once completed please sign the form and return with a cheque made payable to Edmunds & Co, for current prices please see Page 11 of the questionnaire.

Once we receive the completed questionnaire we will draft your Will in accordance with your instructions and send you the draft Will for you to check.

Please return the draft with any amendments clearly marked and we will by return send your Will Document for signing with all necessary instructions.

Yours Faithfully

Edmunds & Co
Wills & Probate Department
wills@Edmunds-Co.com

Note Please print off and send 1 questionnaire form for each will required.

Edmunds & Co. Solicitors

Connect Law[®]

Regulated by the Law Society
Also at 420 Birmingham Road, Wylde Green, Sutton Coldfield, West Midlands, B72 1YJ
DX 22852 WYLDE GREEN

LAWYERS
FOR YOUR
BUSINESS



Will Questionnaire

Edmunds & Co
Solicitors

Malvern House
62 Bradford Street
Walsall
West Midlands
WS1 3QD

01922 633 214

PERSONAL DETAILS SECTION 1

Surname: | (Mr/Mrs/Miss/Ms)

Forename(s): |

Address: |

|

Postcode:

Date of Birth: | DD/MM/YYYY

Telephone No's: | Home Work

Marital Status: | Single / Common Law / Married / Divorced / Widowed

If you have a forthcoming marriage please supply details of the person you will be marrying.

Surname: | (Mr/Miss/Ms)

Forename(s):|

EXECUTORS & TRUSTEES SECTION 2

PLEASE TICK ONLY ONE BOX

- I wish to appoint the Partners of Edmunds & Co to act as my Executors
- I wish to appoint the person named below to act with the Partners of Edmunds & Co.

JOINT EXECUTOR

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Address: |

Postcode:

- I wish to appoint the person(s) named below only to act as my Executor(s)

FIRST EXECUTOR

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Address: |

Postcode:

SECOND EXECUTOR

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Address: |

Postcode:

GUARDIANS DETAILS **SECTION 3**

If you have no children under 18 write none and move to section 5

FIRST GUARDIAN

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

SECOND GUARDIAN

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

Do you wish to provide a sum of money to assist the guardian(s) in their duties?

YES
NO

If YES, how much?

£

Lump sum / Per Annum / Per Month

Or you may wish to state the amount as a percentage of the net estate

%

CHILDREN (UNDER THE AGE OF 18) **SECTION 4**

NOTE: The Law provides that any reference to 'Child' includes illegitimate and adopted children

FIRST CHILD

Surname:
Forename(s):
Date of Birth:
Address:
Postcode:

SECOND CHILD

Surname:
Forename(s):
Date of Birth:
Address:
Postcode:

THIRD CHILD

Surname:
Forename(s):
Date of Birth:
Address:
Postcode:

FOURTH CHILD

Surname:
Forename(s):
Date of Birth:
Address:
Postcode:

YOUR ASSETS	SECTION 5
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PLEASE LIST THE VALUE OF YOUR ASSETS BELOW

PROPERTY	
LAND	
FURNITURE	
PERSONAL EFFECTS	
MOTOR CARS	
BANK ACCOUNTS	
BUILDING SOCIETY ACCTS	
NATIONAL SAVINGS	
STOCKS & SHARES	
PEPS, TESSA'S etc	
LIFE ASSURANCE	
CASH	
OTHER ASSETS	

TOTAL	(A)	£
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PLEASE LIST YOUR LIABILITIES BELOW

MORTGAGES	
CREDIT CARDS	
LOANS	
OUTSTANDING HP	
OTHER	
OTHER	

TOTAL	(B)	£
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NET ESTATE	(A) – (B)	£
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A Specific legacy is a gift of a particular item not money. In this section you should give the full names and addresses of the persons to whom you want to give specific items. Please be accurate and concise.

ITEM 1

BENEFICIARY

Surname: | Forename(s):| Address: | Postcode: **ITEM 2**

BENEFICIARY

Surname: | Forename(s):| Address: | Postcode: **ITEM 3**

BENEFICIARY

Surname: | Forename(s):| Address: | Postcode: **ITEM 4**

BENEFICIARY

Surname: | Forename(s):| Address: | Postcode: **ITEM 5**

BENEFICIARY

Surname: | Forename(s):| Address: | Postcode:

In this section you should set out the amount of money you wish to leave to any particular individual, Institution or Charity, whose name and address should also be supplied.

AMOUNT 1

£

BENEFICIARY

Surname: |

Forename(s):|

Address: |

Postcode:

AMOUNT 2

£

BENEFICIARY

Surname: |

Forename(s):|

Address: |

Postcode:

AMOUNT 3

£

BENEFICIARY

Surname: |

Forename(s):|

Address: |

Postcode:

ITEM 4

£

BENEFICIARY

Surname: |

Forename(s):|

Address: |

Postcode:

AMOUNT 5

£

BENEFICIARY

Surname: |

Forename(s):|

Address: |

Postcode:

DIVISION OF ESTATE / RESIDUE SECTION 8

Your residuary estate is what is left of your estate once your Executors have paid all your debts, settled any Inheritance Tax, distributed any legacies and met the cost of administering your estate.

Do you wish to leave all your estate to only one person, charity or institution?

YES
NO

If **YES** please complete details below, If **NO** move to section 9

BENEFICIARY

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

If the above beneficiary predeceases you how do you wish your estate to be distributed?

ALTERNATIVE BENEFICIARY 1

Share	%
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Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

ALTERNATIVE BENEFICIARY 2

Share	%
-------	---

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

ALTERNATIVE BENEFICIARY 3

Share	%
-------	---

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

ALTERNATIVE BENEFICIARY 4

Share	%
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Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

DIVISION OF ESTATE / RESIDUE SECTION 9

Complete this section only if you answered **NO** to section 8 and wish to leave your estate to more than one person.

BENEFICIARY 1

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Share

%

Address: |

Postcode:

BENEFICIARY 2

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Share

%

Address: |

Postcode:

BENEFICIARY 3

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Share

%

Address: |

Postcode:

BENEFICIARY 4

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Share

%

Address: |

Postcode:

BENEFICIARY 5

Surname: | (Mr/Mrs/Miss)

Forename(s):|

Relationship: |

Share

%

Address: |

Postcode:

ULTIMATE GIFT OVER CLAUSE SECTION 11

Some provision should be made to deal with the possibility of none of your family surviving you. In this section you should name the person, Charity or Institution who should benefit in this event.

If you do not wish to make any such provision write 'NONE' in the space below.

Surname: (Mr/Mrs/Miss)
Forename(s):
Relationship:
Address:
Postcode:

FUNERAL WISHES SECTION 12

Your funeral wishes are not legally binding on your family and Executors and it is not strictly necessary for your wishes to be set out in your Will. However, many people prefer to include such details in their Will to be certain that their wishes are known.

Do you wish?

- To be buried
- To be cremated
- To donate your body for the treatment of others and for medical education or research*

*If you wish to donate your body for medical research it would be advisable to discuss your plans with close relatives or friends and ideally your doctor. A donation will not necessarily dispose of the body and this will need to be considered. In any event you should complete and carry with you a Donor Card.

OTHER RELEVANT INFORMATION SECTION 13

Please list here any additional information

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DECLARATION

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

I hereby request Edmunds & Co Solicitors to proceed in writing a Will on my behalf using the information and requests contained herein.

Signed: _____ Date: _____

PAYMENT

I enclose my cheque for £45.00 + vat = **£52.87**

Please make cheques payable to "Edmunds & Co Solicitors"

I wish to store my Will within the "WillBank" at a cost £15.00 p.a.
If you require our WillBank, please complete the Standing Order below.

The "WillBank" offers (i) Free review & updating for life, as long as the Standing Order below is operational (ii) safe storage of your Will (iii) a certificate of deposit sent to you and your executors.

Instructions to your Bank / Building Society to pay by Standing Order Authority

<p>1. Name and full postal address of your Bank</p> <div style="border: 1px solid black; padding: 5px;"> <p>To: The Manager.....</p> <p>.....Bank</p> <p>Address:.....</p> <p>.....</p> <p>.....Postcode:.....</p> </div> <p>2. Account Name(s)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>3. Account Number</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> <p>4. Branch Sort Code</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> <p>Signature(s): <div style="border: 1px solid black; width: 150px; height: 20px; display: inline-block;"></div></p>															<p>PLEASE PAY</p> <p>Acc Name: Law Master Bank: Lloyds Bank Plc 25 Wolverhampton Street Dudley, DY1 1DJ.</p> <p>Account No: 0936829</p> <p>Sort Code: 30-92-75</p> <p>Ref: <div style="border: 1px solid black; padding: 2px; display: inline-block;">Leave Blank</div></p> <p>6. Payment Details</p> <p>Amount: <div style="border: 1px solid black; padding: 2px; display: inline-block;">£ 15-00</div> (Fifteen pounds)</p> <p>Date of 1st Payment</p> <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px; text-align: center;">D</td> <td style="width: 20px; height: 20px; text-align: center;">D</td> <td style="width: 20px; height: 20px; text-align: center;">M</td> <td style="width: 20px; height: 20px; text-align: center;">M</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> <td style="width: 20px; height: 20px; text-align: center;">Y</td> </tr> </table> <p>Thereafter annually until further notice from me/us in writing and debit my/our account accordingly</p> <p>Date <div style="border: 1px solid black; width: 150px; height: 20px; display: inline-block;"></div></p>	D	D	M	M	Y	Y
D	D	M	M	Y	Y																

