



PRIVATE AND CONFIDENTIAL

# Preparing to make or change your will

Understanding your needs.  
Protecting your interests.

# Proof of Identification

**Important:** please bring to your first appointment one item from list A and one items from list B below, the item from list B should show your address. These documents will be photocopied and the originals returned to you at the appointment. Rules and regulations require that we have proof of identity before we can undertake any work on your behalf, even if you are an existing client of the firm.

List A	List B ( All documents must state names and address)
<ul style="list-style-type: none"><li>• Valid full passport</li><li>• Valid UK photo-card driving licence</li><li>• Valid UK full driving licence (old style)</li><li>• Birth certificate (if not married)</li><li>• Marriage certificate</li></ul>	<ul style="list-style-type: none"><li>• Original bank statement (less than three months old)</li><li>• Original Visa/Mastercard account statement (less than three months old)</li><li>• A receipted utility bill (less than three months old)</li><li>• Council tax bill (less than three months old)</li><li>• Pension book or other Department of Social Services benefit book</li></ul>

# Preparing to make or change your will: questionnaire

Please complete this questionnaire prior to your appointment. You need only complete the sections relevant to your own personal circumstances. If you have any questions, please do contact us and we'll be happy to help.

## 1. Personal details

- Full Name: \_\_\_\_\_
- Other names which you are known by: \_\_\_\_\_
- Date of Birth: \_\_\_/\_\_\_/\_\_\_
- Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Occupation: \_\_\_\_\_
- Nationality: \_\_\_\_\_
- Have you lived outside England / Wales? (please circle) Yes / No
- If so, please state when you (or when they) arrived in the UK: \_\_\_\_\_
- Home phone number: \_\_\_\_\_
- Work / mobile phone number: \_\_\_\_\_
- Email: \_\_\_\_\_
- Do you have an existing Will? Yes / No
- Please tick if you have enclosed your existing Will
- Are you related / connected to anyone at SAS Daniels? Yes / No
- If so, please state who and what the relationship is? \_\_\_\_\_

## 2. Family background

- Marital status: \_\_\_\_\_
- Previous marriages: (please circle) Yes / No
- If divorced, please tick and attach the financial order (if any)
- Do you know if your ex-spouse has remarried? Yes / No
- Do you have plans to marry or form a civil partnership? Yes / No
- Do you have a pre-nuptial agreement? Yes / No  
If yes, please provide a copy
- Do you have any financial dependants? Yes / No

# Preparing to make or change your will: questionnaire

## 2. Family background continued

- Please list the names and relationship of any financial dependents:

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- Family tree (please tick if attached)

**NB.** Names and ages are required and also details of whether they are disabled, in receipt of benefits or having difficulties with finances or their marriage. Please also include details on non-family members who will be included in the will.

## 3. Relevant details for your will

- Who should be your executors? (please provide full names and addresses)

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**NB:** The executors will be responsible for administering your estate and carrying out the instructions contained in your Will. We would advise that you appoint at least two executors who are the same age or younger than you. If your Will contains complex Trusts or if you suspect that someone would contest the provisions of your Will or you have no relative / friend who would be willing to act as you executor, then we can provide executors for you.

- Do you have any funeral wishes which you wish to include in your Will? (Please note that funeral wishes are not binding but they give your executors guidance as to your wishes):

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- If any children are under 18, consider appointing a guardian or guardians, but make sure the guardian (s) is / are willing to undertake the responsibility. Please list the names and addresses of your chosen guardian(s):

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# Preparing to make or change your will: questionnaire

## 4. Financial background

- Have you made gifts in the last seven years totalling more than £3,000? Yes / No

Please list the details:

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- Do you own assets outside of England / Wales? Yes / No

- Do you receive any income from a Trust? Yes / No

- Have you lent money to anyone which has not been repaid? Yes / No

Please list the details:

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- Have you entered any inheritance tax saving schemes? Yes / No

- Do you have an accountant or financial adviser? Yes / No

Please list the details:

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- Do you own your own business? Yes / No

- Are you a sole trader or partner? Yes / No

- Is your business a limited company? Yes / No

- What is the name of your business and what does it do?

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- Who is your business accountant?

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## Preparing to make or change your will: questionnaire

### 5. Assets

Description of asset or property	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value of asset
Land and property:			
Foreign land and property:			
Are there mortgages or charged on the above?	Name of lender: 1.  2.  3.		Amount owed: 1.  2.  3.
Bank and building society accounts:			

## Preparing to make or change your will: questionnaire

### 5. Assets continued

Description of asset or property	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value of asset
Stocks and shares:			
Units trusts / investment trust:			
Premium bonds and other national savings / investment products:			
Life insurance policies and binds with insurance companies:			



## Preparing to make or change your will: questionnaire

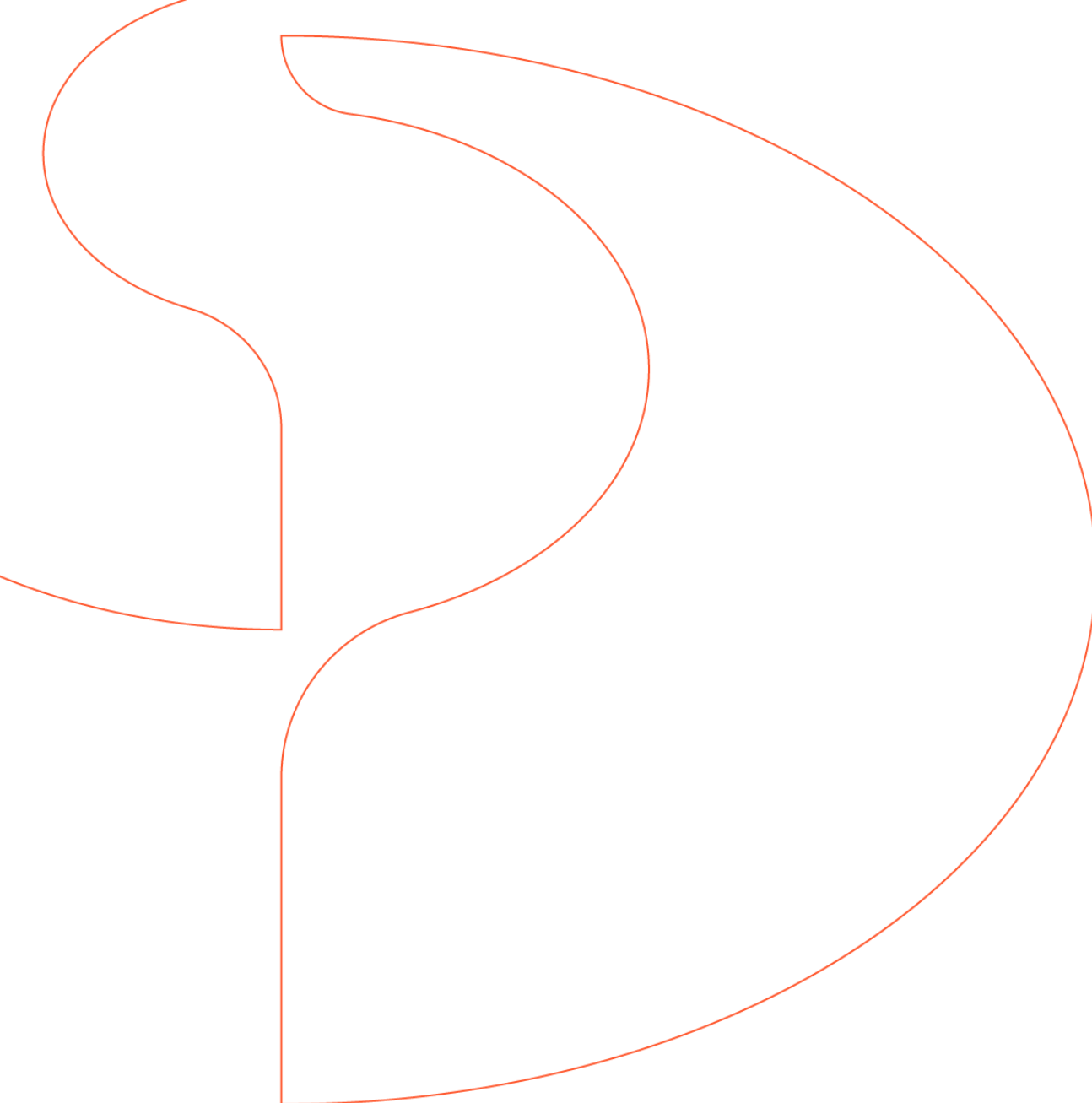
### 5. Assets continued

Description of asset or property	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value of asset
Other bonds:			
Personal effects (e.g. jewellery, furnishing, collectibles & antiques, works of art, cars, clothes, tools and garden items etc):			
Other assets:			

## Preparing to make or change your will: questionnaire

### 6. Pension funds

	Name of employer / trustees / fund administrator	Is this asset located outside England and Wales	Approximate value of asset
Occupational Pension(s):			
Private pension(s):			
Death in service:			



# Thank you

If you have any questions, please contact Justine Clowes, Partner

**T** 01625 442 142

**E** [justine.clowes@sasdaniels.co.uk](mailto:justine.clowes@sasdaniels.co.uk)

Understanding your needs.  
Protecting your interests.

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