

## PREPARING YOUR WILL

### QUESTIONNAIRE

This questionnaire raises questions relating to your personal and financial affairs which need to be considered when preparing your Will.

The questionnaire is for use by both an individual seeking a single will and a couple seeking “mirror” wills.

Wills can be time consuming to prepare as each persons circumstances and requirements are generally unique. We have found that your costs can be reduced if we are provided with detailed information on your individual circumstances before we commence preparation of your will.

You may not be able to answer all the questions and we do not expect you to do so. We would ask that you try to provide us with as much information as possible so that we can ensure the will meets your specific requirements.

#### PART 1 — YOUR DETAILS

**1. Name**

Forenames

Surname

Have you been known by any other name and do you own assets in another name? If so, please provide details.

**2. Address**

Address

Post code

Telephone number (work) (home)

Mobile Telephone number

Fax number (work) (home)

E-mail address

**3. Other details**

Date of birth  
Nationality  
Domicile  
Country of residence for tax purposes  
Occupation

**PART 2 — YOUR SPOUSE OR PARTNER**

**1. Name**

Forenames  
Surname  
Has your spouse/partner been known by any other name? If so, please give details

**2. Other details**

Date of birth  
Nationality  
Domicile  
Country of residence for tax purposes  
Occupation

**3. Marriage/  
partnership details**

*If you are married—*  
Year of marriage  
Did you sign a pre-nuptial contract or other similar agreement? Yes  No   
*If you are not married—*  
Do you intend to get married in the near future? Yes  No   
Did you sign a cohabitation or other similar agreement? Yes  No   
*Previous marriages—*  
Have you been married before? Yes  No

**4. Individual will or joint wills?**

Do you require wills for both yourself and your spouse?  
Yes  No

**PART 3 — CHILDREN**

**1. Your children**

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	
(4) Name	Date of birth
Address	

**2. Grandchildren**

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	
(4) Name	Date of birth
Address	

**3. Your spouse's or partner's children**

(1) Name	Date of birth
Address	
(2) Name	Date of birth
Address	
(3) Name	Date of birth
Address	
(4) Name	Date of birth
Address	

**PART 4 — PROPERTY**

**1. House occupied as your main home**

Address

*(1) Is the property owned in your sole name or jointly?*

sole name       joint names

Name of joint owner

Joint tenants       Tenants in common

In what shares is the property held?

Freehold       Leasehold

Value

Details of mortgage

*(2) Is the property rented?*

Yes       No

*(3) If neither of the above, who owns the property?*

*(4) Where is the Abstract of Title to the property located?*

**2. Other houses**

Address
Is the property owned in your sole name or jointly?
<input type="checkbox"/> sole name <input type="checkbox"/> joint names
Name of joint owner
<input type="checkbox"/> Joint tenants <input type="checkbox"/> Tenants in common
In what shares is the property held?
<input type="checkbox"/> Freehold <input type="checkbox"/> Leasehold
Value
Details of mortgage

**3. Business**

Name of business
Address
Nature of business
<input type="checkbox"/> Company      Number of shares      % of shares
<input type="checkbox"/> Partnership      Partnership share
<input type="checkbox"/> In sole control

**4. Bank, Building Society etc accounts**

Name of Bank/Building Society		
Branch		
Account number		
Estimated value		
Is the account held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If the account is held jointly—</i>		
Who provided the funds, and in what shares?		

**5. Chattels of significant value**

Description	
Value	
Are the chattels held jointly?	<input type="checkbox"/> Yes <input type="checkbox"/> No

**6. Life assurance and pension policies**

	Life assurance policies	Pension policies
Details of policy		
Life assured		
Value		
Written in trust	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**7. Stocks and shares**

	In sole name	In joint names
Value of investment portfolio		
Investment manager		
If the fund is held jointly is it held as joint tenants or tenants-in-common		<input type="checkbox"/> Joint tenants <input type="checkbox"/> Tenants-in-common <input type="checkbox"/> Not known

**8. Property situated outside the Isle of Man**

Type of property	Site	Value
Type of property	Site	Value

Is this will intended to cover your property situated outside the isle of Man? NO  Yes

If No then please speak to us regarding the need for wills in the jurisdiction of your foreign assets.

**9. Settlement interests**

Do you have any interest under a settlement created by you  or any other person , if so please provide details

Type of Settlement:  Interest in Possession  Discretionary  Accumulation and maintenance

Your Interest:  Interest in Possession  Discretionary Beneficiary  Default Beneficiary

Do you have a power of appointment over the Trust Fund?  Yes  No

Are the trustees resident in the IOM?  Yes  No Have they ever been resident outside the IOM?  Yes  No

**10. Other assets**

Please provide details

*Have you made any recent gifts? If so, please provide details.*

<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>
<i>Donee</i>	<i>Item/value</i>

*Do you expect to receive any property of substantial value in the near future, for example as an inheritance? If so, please provide details*

Summary of property	Value of property	
	In sole name	In joint names
House (occupied as main home)		
Business		
Bank, Building Society accounts		
Chattels		
Insurance policies		
Pension policies		
Stocks and shares		
Property situated outside IOM		
Other assets		
Total		

<b>PART 5 — OTHER WILLS</b>
<p>Please provide details of any existing Wills (and a copy)</p> <p>Where is the original located?</p>

**PART 6 — FUNERAL WISHES AND APPOINTMENT OF EXECUTORS AND GUARDIANS**

**Funeral wishes**

A testator may include funeral directions in his Will but these will not be legally binding on his executors

buried    cremated    no preference    body used for medical research

If you have any special wishes as to the place of burial or disposal of ashes what are they?

**Executors**

A testator should choose who should be his executors and appoint them in his Will. In general terms the duties of the executors are to collect in the estate of the deceased, to pay the deceased's debts and to distribute to the persons properly entitled in the Will. You should appoint at least two executors to guard against an executor's prior decease. You can appoint substitute executors who will act if, for any reason, an executor is unable or unwilling to act as executor. You may appoint your spouse or partner as executor. This practice also offers the service of providing an Advocate to act as executor on request.

If you are making joint wills do you wish to appoint each other as sole executor of each others will?   Yes   
No

If you are not making joint wills please list below who you wish to appoint as executor.

If you are making joint wills please also list below who you wish to appoint as executor if your spouse predeceases you.

Executors	(1) Name
	Address
	(2) Name
	Address
	(3) Name
	Address
	(4) Name
	Address

Executors for spouses will	(1) Name Address (2) Name Address (3) Name Address (4) Name Address
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Substitute executors	(1) Name Address (2) Name Address
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Substitute executors for spouses will	(1) Name Address (2) Name Address
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<b>Specific gifts of interest in a house or flat</b>	Name
	Address
	Property
	Name
	Address
	Property

<b>Cash gifts</b>	Name
	Address
	Name
	Address

**Residue**

Your residuary estate is what is left after your executors have paid all debts, expenses, administration costs and legacies. You may consider the following:

- (1) Gifts to spouse/partner may be made outright or on continuing trusts. There may be advantages in using a continuing trust.
- (2) Gifts to children or grandchildren. These can be made outright or on continuing trusts. If the children or grandchildren are young, you may wish to delay distribution of capital until they are older.
- (3) Default gifts. You should decide who you would wish to benefit if your spouse/partner and children die without issue. You may wish to benefit charities.

(1) Name Share of residue

Address

(2) Name Share of residue

Address

**Additional Information on Residue**

It would assist us in the preparation of your will if you set out below in your own words who or what you wish to leave the residue of your estate to.

**PART 8 — ENDURING POWERS OF ATTORNEY**

**Enduring power of Attorney**

Have you appointed someone to act as your attorney under an Enduring Power of Attorney? If so, please provide details (and a copy) of the Enduring Power of Attorney.

Name and address of attorney(s) and his (their) relationship to you

Where is the original Enduring Power of Attorney located?

Where two or more attorneys are appointed do they act  Jointly and severally  Jointly

Has the Enduring Power of Attorney been registered with the Court of Protection?

Yes  No