

# **SYKES ANDERSON WILLS QUESTIONNAIRE**

**Please complete as best you can and then return to Sykes Anderson by post to 9  
Devonshire Square, London EC3M 4YF or by fax to 020 3178 3771  
E-Mail [solicitors@sykesanderson.com](mailto:solicitors@sykesanderson.com)**

**Please note that we will prepare your Will based on the information given in this  
form so please:-**

**Write all names and addresses legibly preferably in block capitals**

**Give full names including any relationship to you**

**If you would like independent financial advice please tick the box**

**If you want advice on the taxation implications of your Will  
(at extra cost) let us know by ticking the box here**

**If your spouse or partner is also making a Will please tick here**

**While we endeavour to produce the draft Will promptly if this matter is  
urgent for example due to ill health, please let us know by ticking here**

25/01/2010

<b>1</b>	<b>Personal Details</b>
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Your Full name	
Have you ever been known by any other name?	
Your full address (including post code)	
Your telephone numbers should we need to contact you	Home  Work  Mobile
Your Email Address	
Your date of birth	
Your occupation	
Your current status (please tick relevant box)	
Single	<input type="checkbox"/>
Married	<input type="checkbox"/>
Divorced	<input type="checkbox"/>
Separated	<input type="checkbox"/>
Widowed	<input type="checkbox"/>
Living with Partner	<input type="checkbox"/>

Do you own assets abroad	Yes		No	
Do you have a foreign Will covering these assets	Yes		No	
Are you about to get married/divorced?	Yes		No	
Are you a beneficiary under any trust?	Yes		No	
Are you domiciled or resident outside England & Wales?	Yes		No	

<b>2</b>	<b>Appointment of Executors</b>
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We advise you to appoint two Executors to manage your Estate on your death.

If you wish to appoint us (Sykes Anderson solicitors) please tick the box below. In this case it is not necessary to appoint another Executor.

<b>I appoint Sykes Anderson Solicitors (tick here)</b>	<input type="checkbox"/>	
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**(If you have ticked the box above go straight to number 3)**

Please state who you would like to act as your Executors:-

<b>Executor 1</b>	
Name	
Address	
Relationship to you	

<b>Executor 2 To Act Jointly with Executor 1</b>	
Name	
Address	
Relationship to you	

If for any reason the Executor(s) named above cannot act for you, you may wish to appoint an alternative Executor(s). If you do please fill in the box below:-

**Alternative Executor 1**

Name	
Address	
Relationship to you	

**Alternative Executor 2**

Name	
Address	
Relationship to you	

**3 Appointment of Guardians**

If you have any children under 18 years old please fill in this section. If you do not have any children under 18 years of age please move on to the next question.

Names & Ages of Child(re n)	
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Who would you like to act as Guardians for your children should both parents die before they reach the age of 18?

<b>Guardian 1</b>	
Name	
Address	
Relationship to you	

<b>Guardian 2</b>	
Name	
Address	
Relationship to you	

If for any reason the Guardian(s) named above cannot act for you, you may wish to appoint an alternative Guardian(s). If you do please fill in the box below:-

<b>Alternative Guardian 2</b>	
Name	
Address	
Relationship to you	

<b>Alternative Guardian 2</b>	
Name	
Address	
Relationship to you	

<b>4</b>	<b>Specific Gifts</b>
<p>Do you want to leave any gifts specifically to anybody? Examples are legacies of money, and gifts of jewellery. If you do please provide details below. We will assume that you wish these gifts to be paid free of tax which means any tax will be paid out of the residue of your estate (i.e. what is left after all specific gifts have been made). Please note the following points:-</p>	
*	If the proposed gift is money then if there is insufficient cash at your death then the proceeds of sale of other assets may be used to satisfy the gift.
*	If the proposed gift is of other assets if these are not owned by you at the date of your death then the gift would fail. One way round this is to make the gift more general, e.g., by referring to such jewellery as you own at the date of death or by substitutional gifts
*	If the asset is owned jointly with another person then depending on the nature of the joint ownership you may not be able to dispose of your interest in the asset under your Will, e.g., it is common for couples to own their house or flat as joint tenants so that on the death of one, that person's interest goes automatically to the survivor.
*	<p><b>IMPORTANT NOTE</b></p> <p>The Inheritance (Provision for Family and Dependents) Act 1975 enables certain people to make a claim for provision out of your estate after your death. If the information which you provide to us for the purpose of preparing your Will indicates that there is a real risk that a claim may be made after your death against your estate we will inform you. If the circumstances require further more detailed advice in relation to the 1975 Act we will be pleased to provide the information upon request by you and an additional fee will be charged.</p>
<b>4.1</b>	<b>Money</b>

4.2	<b>Jewellery</b>
4.3	<b>Cars</b>
4.4	<b>House/Other Property</b>

<b>5</b>	<b>Gifts of your Estate or Residue of your Estate if you have left Specific Gifts</b>
<p>Please state below how you wish to leave the rest of your Estate. You may wish to leave 100% of your Estate to one person or alternatively you may wish to divide it up into shares between other people. Please indicate below:-</p>	

<b>6</b>	<b>Should any beneficiary of the Gifts above die before you, who would you like to leave your Estate/Residue to?</b>

7

**Funeral Wishes**

It is not possible to legally bind your Executors to carry out your funeral wishes. However we advise you to tick the appropriate box below indicating wishes.

Cremation

Burial