

## BONALLACK & BISHOP - WILL MAKING QUESTIONNAIRE

### SECTION 1 – YOU, YOUR FAMILY AND WHAT YOU OWN

Your full name	
Your full address including postcode	
Your telephone number	
Your mobile telephone number	
Your e mail address	
Are you happy for us to correspond with you by e mail?	YES/NO
Your date of birth	
Your occupation	
Your marital status	Single/Married/Widowed/Divorced/Civil Partnership/with Partner
Your partner's full name	
Your partner's date of birth	
Please provide full names, addresses and dates of birth for all your children, including those from a previous marriage or relationship	
Do you own your home in your own name, or in the joint names of yourself and your spouse/partner?	
What would you estimate the value of your home to be?	
Is there a mortgage on the property and, if so, roughly how much is outstanding?	
Do you have a policy in place which would pay off the mortgage in the event of your death?	
Do you have a business? If so, are you a sole trader, a partner, or a director?	
Do you own any property abroad?	

If the value of everything you own exceeds £325,000 (£650,000 between you if you are a married couple) then Inheritance Tax advice may be relevant. If you would like us to discuss this with you, please attach a separate sheet listing your other assets – bank and building society accounts, shareholdings, insurance policies, premium bonds etc together with the current balance/value and please confirm whether in your sole name or in the joint names of you and another

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### SECTION 2 – YOUR WISHES

Do you have any funeral wishes?	Burial/Cremation/No preference
<p>The executors are the people you appoint in your Will who will ensure your wishes are carried out. We recommend that you appoint a minimum of 2. You may appoint anyone over 18, including your spouse/partner. Please provide <b>full</b> names and addresses of the executors you wish to appoint.</p> <p>The partners of Bonallack &amp; Bishop would be happy to act as your executors, either alone or together with a family member or friend</p>	I wish B&B to act as my executors/I do not wish B&B to act as my executors
If you have children under 18, we recommend that you appoint guardians who would care for them in the event of you dying while they are young. Please give the full names and addresses of any guardian(s) you wish to appoint	
Do you wish to leave any gifts of cash (legacies?) If so please list the full names and addresses of those you wish to leave cash to, together with a note of the amount	Please list on a separate sheet
Do you wish to leave any gifts of your personal items – jewellery etc? If so please give names of those you wish to leave items to, together with a note of the item sufficient to identify it	Please list on a separate sheet
<p>The residue of your estate is everything that you own after any legacies have been paid and any personal items given to people listed above, and your funeral costs and any other debts and liabilities have been paid. Please state you wish to receive the residue of your estate. Some of the most common provisions are listed opposite. If you wish these to apply, please tick them. If they are not appropriate for your circumstances, please give the full name/address of any person or persons or full details of any organisations you wish to receive your residue, together with the share you wish to leave (e.g. “all”, 50%)</p>	<p>All to my spouse/partner</p> <p>If she/he has died, then all to your children equally</p> <p>If any of your children die before you leaving children of their own (your grandchildren) then to those grandchildren at 18/21/25</p>