

PROTECTING THE ONES YOU LOVE

We have created this useful questionnaire to help you to carefully consider what you would like to happen to the people you care about & all the things that matter most to you (money, property and possessions) when you die.



Personal details must be completed by each person making a Will to comply with the Law Society Rules on ID, Fraud & Money Laundering – thanks for your understanding.

Full Name.....

Permanent Address

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How long have you lived at this address?

If less than 5 years please state previous address

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Date of Birth Telephone No.....

E-mail Address

Are you an existing client? (Y/N) If not how did you hear about Scullion LAW?

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Marital Status (please circle): Married / Civil Partner/ Separated / Divorced / Single

If you are married or have a civil partner please provide details:

Full Name Spouse/ Civil Partner.....

Address.....

Date and place of Marriage / Civil Partnership.....

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If you are widowed please provide details:

Late Partner/Spouse Name:.....

Date of Death:.....

Did you inherit their full estate on their death?.....

If you live with someone (**NOT** a marriage or civil partnership) please provide details:

Name.....

Address.....

How long you have been co-habiting?

If you have been divorced or separated please provide details:

Previous Partner/ Spouse's Name.....

Do you have a registered Separation Agreement?Date.....

How many **natural or adopted** children do you have?

Child 1:

Full name:Date of birth.....

Address:

Child 2:

Full name:Date of birth.....

Address:

Child 3:

Full name:Date of birth.....

Address:

Please provide details of any additional children on a separate sheet of paper.

Are any of your children **vulnerable** or **disabled**? If so, please provide details.

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Do you have any **step-children**? Please provide full details of whether these children are from your present relationship or a previous marriage/relationship

Full name: Date of birth.....

Address:

Full name: Date of birth.....

Address:

Full name: Date of birth.....

Address:

Do you have any children who have predeceased you leaving kids of their own? YES / NO Please provide details

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Are your parents alive? YES / NO.....

If so, please give name & address.....

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Do you have any brothers or sisters? YES / NO

If so, who? Names & addresses

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Heritable Property: Please provide details of all property in the UK owned by you or jointly with any other person (e.g. your principal home, properties let to third parties, holiday homes, etc.) and provide an approximate current market value if known.

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If the property is jointly owned, is there a survivorship destination?

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Please provide details of any foreign assets, including property abroad which is owned by you or in which you have a share:

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Moveable Property: Please provide details of all bank accounts, life assurance policies, personal investments, savings or trusts under which you do or may benefit, including approximate values. (We don't require bank account numbers or sort codes).

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Are any of these written in Trust? If so please provide details (It would help to have a copy of any trust documentation to hand please for your Will meeting. Thank you)

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Please provide details of any companies owned by you or in which you have an interest, including shareholding percentages and approximate value.

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What pension provisions do you have? Private / occupational /death in service benefits. Are these currently in draw-down?

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What digital assets do you have e.g. social media accounts / online banking / online gambling etc. What would you like to happen to these in the event of your death?

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Please provide details of any other property you own which has significant monetary or sentimental value to you e.g. paintings, jewellery, heirlooms etc. Please specify all of your wishes and write down exactly what has to go to whom. This can greatly help to reduce the risk of disagreements arising between family and friends in the future.

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Liabilities & Debts

Please provide details of any loans and debts, e.g. Mortgage? Are these protected?

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Is your estate likely to exceed the Nil Rate Band for Inheritance Tax (Currently £325,000 per person)?

Have you made any significant gifts in the last 7 years? If so please provide details including what has been gifted, when and to whom:

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Do you have a financial advisor? Please provide details

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If you have any questions or if you need to leave certain areas blank we can discuss them in more detail in our meeting. Client Care is at the core of everything we do. Thank you for trusting in Scullion LAW. We are here to help.

This next section allows you to clearly communicate your wishes, with regards to what you would like to happen to your Estate/ Possessions when you die.

EXECUTORS are responsible for paying debts & distributing your Estate for you

It is advisable to consider having more than one Executor, either as a joint appointment or with a substitute, and he/she should be over 18 years of age.

Name

Address.....

Name

Address.....

Do you want to appoint Scullion LAW to act as an Executor? YES/ NO

Please provide details of all specific **items** (including sentimental gifts) or **cash amounts** you wish distributed to a particular beneficiary (or Charity).

1. Name.....

Address.....

Items.....

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2. Name.....

Address.....

Items.....

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3. Name.....

Address.....

Items.....

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4. Name.....

Address.....

Items.....

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5. Name.....

Address.....

Items.....

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Please provide details of the beneficiaries of the **RESIDUE** (the amount remaining once bequests are made and any debts paid) of your Estate, indicating percentages applicable where more than one beneficiary applies:

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Should any of your beneficiaries die before you, please let us know should the property you intended to pass to them be passed to someone else (i.e. their children) or do you wish the share to be divided between the remaining surviving beneficiaries?

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Additional information for Trusts

BENEFICIARIES: It is important to note that if any beneficiary is vulnerable or disabled (either mentally or physically) his or her share of the Estate can be passed into a VULNERABLE BENEFICIARY TRUST otherwise he/she may no longer be entitled to any means tested benefits he/she had previously been getting.

At what age do you wish the income and/or capital of your estate to be paid over to any beneficiary? (e.g. 18, 21, 25). Unless otherwise stated within the Will, the age of inheritance in Scotland is 16.

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In the event that you and your partner both die, whom do you wish to appoint as a guardian for any children under 16?

Full Name.....

Address.....

Full Name.....

Address.....

Please note, your Will is often not read until after your funeral so please make your wishes known to family & friends so they can make the appropriate arrangements.



Please provide details of any special **funeral directions** you wish to include. Things to consider: burial, cremation, or other... what sort of service would you like?

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Do you wish to **donate your organs** when you die? Please provide details below. We strongly encourage you to make your wishes known by carrying a donor card and/ or joining the NHS organ donation register so that people are aware of this.

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Additional information

Have you made a Will before? YES/NO. If YES, which solicitors (if any) did you use? We strongly recommend all of our clients to update their Will every 3-5 years.

Have you considered a **Living Will**? YES / NO

Do you have a Power of Attorney in Place? YES / NO

Would you like to put a Power of Attorney in Place? YES/NO

A **Power of Attorney** allows you to give someone / the people you trust the power to make important decisions on your behalf **if** you were to lose capacity in the future.

Who you would you like to appoint as your Attorney? You can have more than one...

1. Full Name
- Address.....
2. Full Name
- Address.....

Please provide any additional information that you feel is important in connection with the creation of your Will.

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Once you have filled out this questionnaire, please call to make an appointment to discuss everything with our experienced Private Client solicitors. We have offices in Hamilton, Glasgow Saltmarket area and also in the West End of Glasgow.

Please bring 2 items of ID to your meeting (E.g. Passport/Utility Bill)

We are delighted to provide 'home' visits if more convenient for you.



We look forward to our meeting with you.

Best wishes,

Scullion LAW

Signature.....

Date.....

Email info@scullionlaw.com or call us anytime on **01698 283 265** or **0141 374 2121**