

SCULLION LAW Free Will Scheme in aid of Marie Curie

WILLS QUESTIONNAIRE



Please call us on **0141 374 2121** or **01698 283 265**

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HOW TO COMPLETE THIS QUESTIONNAIRE

Thank you for enquiring about making a Will with Scullion LAW in aid of Marie Curie.

In order for us to give you the best advice and for us to draft a Will which suits your individual circumstances, we require to obtain information about your personal situation, your family arrangement and your property and assets.

Please review this form and complete as much of the information as possible ahead of your appointment. Don't worry - some of the questions won't apply to you and if you are unclear about what anything means then please just leave the section blank and we will discuss fully and complete the questionnaire at our meeting.

WHAT TO BRING TO THE APPOINTMENT

- **This form**
- **Identification** - If we haven't done any work for you in the last 3 years then please bring to your appointment 2 forms of Identification, one with your photograph (Passport, Driving Licence, Bus pass) and one with your address (Bank Statement, Utility Bill) dated within 3 months.

DATA PROTECTION STATEMENT

Please note Scullion LAW will not pass any of the information contained in the questionnaire to a third party, including Marie Curie. The information will be used only for the purposes of advising you in respect of your Will and any other recommended legal services for your own personal circumstances.

Thank you. If you have any questions – don't hesitate to ask!

ABOUT YOU

Full Name.....

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

Preferred Method of Communication Phone/Email/Text/Letter

Marital Status: Single/ Married / Civil Partner/ Widowed/ Separated / Divorced

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.....

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.....

Date of Divorce:.....Which Court?.....

ABOUT YOUR FAMILY

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

How many **step-children** do you have?.....

For all of your children/step children please provide their names, addresses and dates of birth (please use additional paper if necessary)

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

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Do you have any children who have predeceased you leaving children 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, please give names & addresses.....

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YOUR ESTATE

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 approx. values. (We do not 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 which may have a value on your death? E.g. Social media accounts / online banking / online gambling accounts.

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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 etc.

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Liabilities & Debts

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

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Tax

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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YOUR WILL

If you are unsure about anything, please leave the section blank and we can discuss during our meeting. Thank you.

WHO WILL BE YOUR EXECUTORS? i.e. who do you want to be responsible for paying any debts & distributing your estate - 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 as an Executor?

Can we contact your executors?

DISTRIBUTION OF YOUR ESTATE:

Please provide details of how you wish your estate to be divided on your death:

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Should any of your beneficiaries die before you, should the property you intended to pass to them be passed to:

Someone else (i.e. their children)

or Remaining surviving beneficiaries

Vulnerable 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. Is this required?

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Beneficiaries who are Children?

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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Guardianship Provision for your Children

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.....

Funeral Directions

Please provide details of any funeral directions you wish to include within your Will (e.g. burial, cremation, Church Service etc. special music/ hymns/ songs/ prayers etc)

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Marie Curie

Would you like to remember Marie Curie in your Will?

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ADDITIONAL INFORMATION

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

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

This is something we would be more than happy to assist with. Please let us know who you would you like to appoint as your Attorney? You can have more than one...

1. Full Name

Address.....

2. Full Name

Address.....

3. Full Name

Address.....

Have you considered a Living Will? YES / NO

Have you made a Will before? YES/NO. If YES, which solicitors (if any) did you use?

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

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We look forward to our meeting with you at our appointment.

Best wishes,

Scullion LAW

Signature..... Date.....

