

MITCHELLS WILL QUESTIONNAIRE

If you would prefer to speak with someone direct, please contact us on 01904 623751

1. PERSONAL DETAILS

FULL name _____

Address _____

Telephone (home) _____ (work) _____ (mobile) _____

Family:

Spouse/Partner _____

Children name and address and (if under 18) age

Dependants: name and address and (if under 18) age

Other people to be considered: name and address and (if under 18) age

2. ASSETS AND APPROXIMATE VALUES

Do you own your own home? Yes/No Value £_____

Details of ownership (joint/sole owner; share owned; other parties involved; joint tenants/tenants in common; mortgage outstanding; life cover for mortgage etc)

Details as above for any other land/ houses/ buildings owned or leased

Do you own a business? Yes/No Type _____

Company/partnership/sole trader Value £_____

Details of ownership (joint/sole owner; share owned; other parties involved; loans outstanding; property owned by business or owned by you and used by business; life cover for business debts etc) _____

Other assets: Shares £_____ Bank Accounts £_____

Life Policies £_____ Pensions £_____

Other £_____

Debts: Credit Cards £_____ Family Loans £_____

Other Loans £_____

3. WILL PROVISIONS

If you have a spouse or partner then you need to consider who is to benefit if you die before your spouse or partner and who if your partner dies before you.

Proposed Executor(s) (your Executors will be responsible for dealing with your affairs after your death and must be over the age of 18): name and address

Substitute Executor: _____

Guardian of children under 18: name and address _____

Substitute Guardian: _____

Specific Gifts (money/items to people/charities) _____

Residuary Gifts (this is the whole of your estate apart from specific gifts above, if you wish to leave your estate to anyone under the age of 18 you must decide at what age they are to inherit and you will need at least 2 Executors to act as Trustees until that age) _____

Substitute Residuary Gifts _____

Funeral Wishes _____

4. LIFETIME PROVISIONS

Your Will only takes effect after your death. You may wish to consider making provision to deal with assets by way of gift during your lifetime whether absolutely or by creating a trust. You should also consider appointing someone (or more than one person) to act for you under a Lasting Power of Attorney in the event that you become unable to manage your own affairs due to ill health/accident/old age.

Have you set up any lifetime trusts? Yes/No

If so, please give details _____

Do you wish to discuss lifetime trusts/gifts? Yes/No

Have you made a Power of Attorney? Yes/No

If so, who have you appointed to act for you? _____

If not, would you like to discuss it further? Yes/No

Who do you think you might like to appoint? _____

Please return the completed form to:

***Mitchells
2 Peckitt Street
York
YO1 9SF***

Or to make an appointment to see our Will Specialist, John Staniland, please contact us on:

***Telephone: 01904 623751
E-mail: enquiries@mitchellssolicitors.co.uk***