

# Stocker & Co Solicitors

## CONVEYANCING

The domestic Conveyancing Department is run by Marion Sayed who can deal with property all over England and Wales. Please call for more information or send us an email to obtain an online quotation.

Name:	
Address:	
Telephone number:	
Sale of:	
Sale price:	
Selling agents:	
In whose name is the property held?	
Is there a Lender?	
Name of Lender and mortgage account number: Purchase of :	
Purchase price:	
Name of Sellers:	
Sellers Solicitors:	
Mortgage arrangements:	

# YOUR WILL CLIENT: QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign. Details of our firm, and your appointment if made, are set out below.

## PART A - YOU AND YOUR FAMILY

### 1. YOUR DETAILS

Forenames .....
Surname .....
Address .....
.....
.....Postcode .....
Telephone Number .....
Date of Birth .....
Occupation .....

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

.....
.....
.....
.....

### 3. YOUR HUSBAND/WIFE/PARTNER

Forenames .....
Surname .....
Date of Birth .....
Occupation .....

### 3. MARRIAGE/PARTNERSHIP DETAILS

- (a) Year of Marriage
- (b) Please tick this box if you are not married to your partner **H**
- (d) Please tick this box if you are intending to marry/re-marry in the near future
- (e) Has either of you been married before?  
Yes      No

### 4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP) - full names, dates of birth, and address if different from yours

(a) Name .....
Date of Birth .....
Address .....
.....
(b) Name .....
Date of Birth .....
Address .....
.....
(c) Name .....
Date of Birth .....
Address .....
.....
(d) Name .....

5. CHILDREN OF *YOUR* HUSBAND/WIFE/PARTNER'S  
PREVIOUS MARRIAGES OR RELATIONSHIPS - full names,  
dates of birth, and address if different from yours

(a) Name .....
Date of Birth .....
Address .....
.....
.....
(b) Name .....
Date of Birth .....
Address .....
.....
.....
(c) Name .....
Date of Birth .....

**Please note:**

- \* Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- \* Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

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**PART B - YOUR HOME AND OTHER ASSETS**

6. YOUR HOME - is your home: (a)

Owned:

- (i) in your name alone?           Yes
- (ii) in joint names with your       No  
      husband/wife/partner?       Yes
- (iii) in the name of your husband/   No  
      wife/partner alone?       Yes

(b) Rented?                               Yes I\_ I No

(c) Other - e.g. provided by a relative   Yes  
      No

7. If your answer was (c) please give more details:

.....
.....
.....
.....

8. Do YOU HAVE A BUSINESS?           Yes    No **H**

If yes: - state type of business

.....
.....

Is it a (tick box):

Company       Partnership   In Your Sole Name

**9. YOUR MAIN ASSETS**

Please list your other main assets below and give approximate values:-

.....
.....
.....
.....

10. JOINT ASSETS

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

.....
.....
.....
.....

**Please note:** Jointly owned assets generally pass to the joint owner automatically and cannot be given away by Will.

**11. DO YOU OWN ANY ASSETS ABROAD?**

If yes, please give details:-

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.....
.....
.....

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**PART C - FUNERAL, EXECUTORS, GUARDIANS**

**12. FUNERAL.**

You may specify in your Will if you wish to  
be:-Buried           Cremated           No preference

**Please note:**

\* You should make these wishes known to your immediate family as well and not rely on what is in your Will.

\* If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card.

**13. EXECUTORS**

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband/wife/partner as one. You should name other executors to act if he/she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

List below up to four chosen executors.

(a) Name .....

Address .....

.....

.....

(b) Name .....

Address .....

(c) Name .....

Address .....

.....

.....

(d) Name .....

Address .....

Would you like partners from our firm to act as your executor(s)?      Yes      No

**14. GUARDIANS**

You may want to appoint one or two people to act as guardian(s) for children under 18. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name .....

Address .....

(b) Name.: .....

Address .....

**PART D - BENEFICIARIES**

The main part of your estate is called "the residue". (This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

**15. CASH GIFTS**

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

(a) Name .....

Address .....

..... Amount £.....

(b) Name .....

Address .....

..... Amount £.....

(c) Name .....

Address .....

..... Amount £.....

(d) Name .....

Address .....

..... Amount £.....

**16. GIFTS OF ARTICLES**

Please give the names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will not be given the substituted item or the cash equivalent.

(a) Name .....

Address .....

.....

Article .....

(b) Name .....

Address .....

Article .....