

Preparing to make or change your Will

Private and confidential



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 **sas daniels LLP**
No ordinary law firm.

Proof of identification

Important: please bring to your first appointment one item from list A and one item from list B below, the item from list B should show your address. These documents will be photocopied and the originals returned to you at the appointment. Rules and regulations require that we have proof of identity before we can undertake any work on your behalf, even if you are an existing client of the firm.

List A	List B (All documents must state names and address)
<ul style="list-style-type: none">• Valid full passport• Valid UK photo-card driving licence• Valid UK full driving licence (old style)• Birth Certificate (if not married)• Marriage Certificate	<ul style="list-style-type: none">• Original bank statement (less than three months old)• Original Visa/Mastercard account statement (less than three months old)• A receipted utility bill (less than three months old)• Council tax bill (less than three months old)• Pension book or other Department of Social Services benefit book

Preparing to make or change your Will: questionnaire

Please complete this questionnaire prior to your appointment. You need only complete the sections relevant to your own personal circumstances. If you have any questions, please do contact us and we'll be happy to help.

1. Personal details

- Full Name: _____
- Other names which you are known by: _____
- Date of Birth: ___/___/___
- Address: _____

- Occupation: _____
- Nationality: _____
- Have you lived outside England / Wales? (please circle) Yes / No
- If so, please state when you (or when they) arrived in the UK: _____
- Home phone number: _____
- Work / mobile phone number: _____
- Email: _____
- Do you have an existing Will? Yes / No
- Please tick if you have enclosed your existing Will
- Are you related / connected to anyone at SAS Daniels? Yes / No
- If so, please state who and what the relationship is? _____

2. Family background

- Martial status: _____
- Previous marriages: (please circle) Yes / No
- If divorced, please tick and attach the financial order (if any)
- Do you know if your ex-spouse has remarried? Yes / No
- Do you have plans to marry or form a civil partnership Yes / No
- Do you have a pre-nuptial agreement? Yes / No
- If yes, please provide a copy
- Do you have any financial dependants? Yes / No

Preparing to make or change your Will: questionnaire

2. Family background (continued)

- Please list the names and relationship of any financial dependents: _____

- Family tree (please tick if attached)

NB. Names and ages are required and also details of whether they are disabled, in receipt of benefits or having difficulties with finances or their marriage. Please also include details of non-family members who will be included in the Will.

3. Relevant details for your Will

- Who should be your executors? (please provide full names and addresses) _____

NB. The executors will be responsible for administering your estate and carrying out the instructions contained in your Will. We would advise that you appoint at least two executors who are the same age or younger than you. If your Will contains complex Trusts or if you suspect that someone would contest the provisions of your Will or you have no relative / friend who would be willing to act as you executor, then we can provide executors for you.

- Do you have any funeral wishes which you wish to include in your Will? (Please note that funeral wishes are not binding but they give your executors guidance as to your wishes): _____

- If any children are under 18, consider appointing a guardian or guardians, but make sure the guardian (s) is / are willing to undertake the responsibility. Please list the names and addresses of your chosen guardian (s): _____

- Do you have any pets which you wish to make provisions for? Yes / No
Please list: _____

Preparing to make or change your Will: questionnaire

4. Financial background

- Have you made gifts in the last seven years totalling more than £3,000? Yes / No
Please list the details: _____

- Do you own assets outside of England / Wales? Yes / No
- Do you receive any income from a Trust? Yes / No
- Have you lent money to anyone which has not been repaid? Yes / No
Please list the details: _____

- Have you entered any inheritance tax saving schemes? Yes / No
- Do you have an accountant or financial adviser? Yes / No
- Please list the details: _____

- Do you own your own business? Yes / No
- Are you a sole trader or partner? Yes / No
- Is your business a limited company? Yes / No
- What is the name of your business and what does it do? _____

- Who is your business accountant? _____

5. Assets

Description of asset or property.	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value or asset.
Land & property:			

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5. Assets (continued)

Description of asset or property.	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value or asset.
Foreign land & property:			
Are there Mortgages or charges on the above?	Name of lender: 1. 2. 3.		Amount owed: 1. 2. 3.
Bank & Building Society accounts:			
Stocks & shares:			
Units trusts / investment trust:			

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5. Assets (continued)

Description of asset or property.	Is this owned solely or jointly?	Is this located outside England or Wales?	Approximate value or asset.
Premium bonds and other national savings / investment products:			
Life insurance policies and bonds with insurance companies:			
Other bonds:			
Personal effect (e.g. jewellery, furnishing, collectibles & antiques, works of art, cars, clothes, tools and garden items etc.):			
Other assets:			

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6. Pension funds

	Name of employer / trustees / fund administrator	Is this asset located outside England and Wales	Approximate value of asset
Occupational Pension (s):			
Private Pension (s):			
Death in service:			

Thank you.

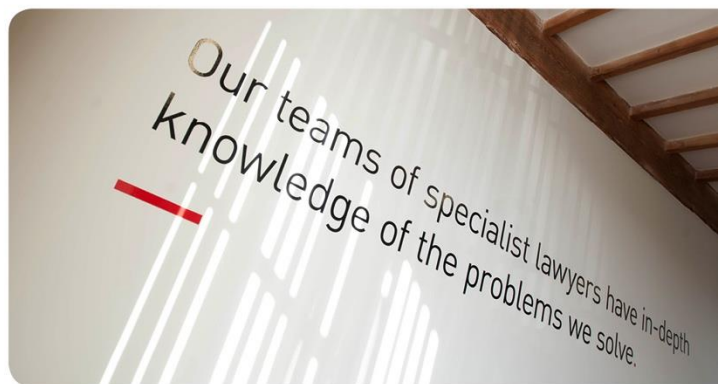
If you have any questions, please contact:

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