Will Questionnaire

Gardner Leader

Your Will Questionnaire

This Questionnaire will provide you with information regarding the preparation of your Will and allow us to obtain the information needed to prepare a Will for you.

Please use it as a guide prior to your meeting with us or complete it and return it to us so we can prepare a draft Will. Please ensure that you complete all sections. If there is insufficient room, please attach additional sheets.

It will not always be necessary to meet with you to take instructions however we will need to meet with you for the signing of your Will.

The facts and figures quoted in this questionnaire are correct for the tax year to 5 April 2027.

We are committed to agreeing a fixed fee with you for the preparation of your Will and we will agree that fee with you on receipt of your instructions or during any initial meeting.

The initial meeting with you will be free (unless otherwise agreed).

Please refer to our Wills and Estate Planning pricing information for more details of our pricing options for Wills, Estate Planning, Inheritance Tax planning and Lasting Powers of Attorney.

Section 1 - Your Details

Preferred Title	
Surname	
First names	
Marital status	
Date of birth	
Address	
E-mail	
Telephone numbers: • daytime • mobile	
Occupation	
Do you have a current Will? If so, where is it located?	

Section 2 - Your children/dependants/grandchildren

Please detail below the names, addresses and dates of birth of your children and grandchildren. This includes any legally adopted children, step children and dependants. It is vital that you detail all children / dependants even if they are not benefiting under the terms of your Will.

Full name	Address	Date of birth	Relationship to you

If any of your children are under the age of 18 you should consider the appointment of a Guardian for them until they reach the age of 18. The Guardian would be responsible for the child's physical welfare.

Guardian's full name	Address	Relationship to you

If any children under the age of 18 ("minors") are likely to be beneficiaries of your Will, at what age would you want them to receive their inheritance? If you do not state an age, the law provides that they inherit at 18. Please note that a small inheritance tax charge may arise if you stipulate an age over 18 in relation to your children and on gifts to grandchildren – we can advise you on the implications of this if necessary.

Minor Beneficiary	Age of inheritance

Disabled beneficiaries

If any of your beneficiaries are disabled, it is essential that you make appropriate provisions in your Will particularly with regard to Guardians and Trustees as your beneficiary may not be able to manage any inherited funds. We are experts at advising those with disabled beneficiaries and recommend meeting with you to discuss your particular circumstances.

Section 3 - Your executors/trustees

"Executors" The people who deal with your estate after your death.

"Trustees" The people who are responsible for any money held on trust for any beneficiaries.

You can name the same people to act as your executors and trustees and this is often recommended, as the two roles are similar. You can appoint anyone, including beneficiaries, so long as they are over the age of 18. We generally recommend that you appoint one to four executors/trustees.

The responsibilities placed on executors and trustees can be onerous as they are responsible for settling any tax due on your death and dealing with all of the authorities. It can therefore be wise to appoint a professional person who will be able to deal with the estate independently and will be experienced in dealing with the paperwork. Gardner Leader often act in this respect either as a sole executor or jointly with other executors.

☐ I would like to appoint Gardner Leader Trust Corporation Ltd as sole executor/trustee.
☐ I would like to appoint Gardner Leader Trust Corporation Ltd to act as executor/ trustee along with those people named below.
☐ I do not want to appoint Gardner Leader Trust Corporation Ltd.

Name of executor/trustee	Address	Relationship to you

You may wish to consider substitute executors/trustees in case your chosen executor/trustee dies before you.

Substitute executor/trustee	Address	Relationship to you

Section 4 - Your assets and liabilities

Please detail your assets and liabilities and their approximate value. Assets will include property, investments, bank or building society accounts, valuable possessions, life insurance policies, pensions, death in service benefits, digital assets with a monetary value to include, but not limited to, crypto currency, on-line only accounts and non-fungible tokens (NFTôs). Please indicate whether any land you own is situated outside the UK. Liabilities will include mortgages, unsecured loans etc.

Description of assets in your name	Approximate value (£)
Total	
Description of any assets in joint names and with whom	Approximate value (£)
Total	

Description of liabilities in your name	Approximate amount outstanding (£)
Total	
Description of any liabilities in joint names and with whom	Approximate amount outstanding (£)
Total	

Inheritance tax planning

Our team can advise you on inheritance tax planning, and options such as gifts and charitable gifts which can offer extra flexibility and reduce the value of your residual estate, and therefore the tax payable on it. We recommend that you seek early advice on your inheritance planning, especially if the value of your estate is likely to exceed £325,000, in order to maximise the benefits of trusts and gifts, and ensure that your planning works best for you and those who will benefit from your Will later on.

We can advise on inheritance tax planning including the exemptions, reliefs and explanation of "the nil rate band". For pricing options please see the Wills and Estate Planning pricing information sheet.

☐ I would like advice on inheritance tax planning.

Section 5 - Legacies

Please detail below the legacies that you wish to gift. A legacy is a fixed gift of a sum of money or a specific item (i.e. jewellery, car, painting, etc).

Unless you indicate otherwise, we shall assume that you wish the legacy to be free of inheritance tax and that all inheritance tax due on your estate shall come from your residuary estate (see section 6).

Name, address and relationship to you of beneficiary	Legacy	When to be paid

Section 6 - Residue

The term "residue" refers to the remainder of your estate after the payment of the legacies and all the expenses of death (funeral, taxes, estate administration expenses, etc). As it is impossible to calculate the value of your residue, we recommend that if you wish to split it between several people (your "residuary beneficiaries"), you do so by way of a percentage to each.

Please detail below who you would wish to be your -residuary beneficiaries and the proportions of your residuary estate you would wish them to receive. Please state their date of birth if they are under 18.

Residuary Beneficiary	Address	Relationship to you	Share of estate (%)

"Doomsday" provisions

We recommend that you include so called "doomsday" provisions to provide for the situation where all of your preferred beneficiaries have died before you. Please detail below who you would wish to receive your residuary estate should this situation occur. You may wish to include charities here.

Doomsday Beneficiaries	Address	Relationship to you	Share of estate (%)

Section 7 - Matters to consider

Use of Trusts

Life interest trust (known as Immediate Post Death Interest trust - IPDI trust)

This trust provides that a beneficiary (known as the "life tenant") can enjoy the benefit of an asset for a defined period commencing on the death of the testator (normally the duration of the life tenant's life). Upon the expiry of that period, the asset passes to named beneficiaries. If the life tenant is the surviving spouse / civil partner there is no IHT on the IPDI assets. Such a trust is frequently used in the following situations:

1. Where you wish to provide adequately for your partner or cohabitant but at the same time protect your estate for your children.
2. Where you wish to guarantee a right of occupation for a relative for the rest of their lives but also to protect the asset for their own beneficiaries.

Discretionary trusts

Our team can provide advice on the use of trusts which are frequently used in the following situations:

1. Gives flexibility to accommodate future changes to your family and assets.
2. Where any of the beneficiaries are under the age of 18.
3. Where you have concerns that any of the beneficiaries are vulnerable.
4. Uncertainty surrounding the timeline and the entitlement of beneficiaries.
5. Where you wish to guarantee a right of occupation for a relative for the rest of their lives but also to protect the asset for their own beneficiaries.

It is important to appoint a panel of trustees who will have an important role in the distribution of trust property. The Partners of Gardner Leader Trust Corporation Ltd can act as trustees if you wish.

Lasting Powers of Attorney

Lasting Powers of Attorney (LPAs) are documents which allow you to appoint someone you trust (known as an attorney) to look after your financial affairs and/or your personal welfare, typically if you are no longer able to do so. Drawing up a lasting power of attorney gives you the opportunity to decide who you would like to do this for you and include any particular wishes you have or restrictions on your attorney’s powers should you lose your mental or physical capacity.

Your attorneys will then be able to deal with your finances to provide for you and make decisions as to your care arrangements, medical treatments and/or your money and house. If you do not have an LPA (or an older style Enduring Power of Attorney) anyone may apply to the Court of Protection to be appointed as your deputy. This is a lengthy and expensive process that may result in someone being appointed that you wouldn’t have chosen. We do recommend LPAs to all clients who are concerned about long-term care issues and potential loss of capacity. Please refer to our Wills and Estate Planning pricing information sheet for more information.

Section 8 - National Wills Register

We recommend that you store your original Will in Gardner Leader's strong room for safekeeping. This service is provided free of charge.

If you wish, we can also register the location of your Will on the National Will Register and provide you with the registration certificate. This ensures that if anyone ever needs to locate your Will after your death, they will be able to do so. The additional fee for this service, if not included in your pricing package, is £25 plus VAT for one Will or £35 plus VAT for a pair of Wills. If you would like more information about the UK's first fully electronic online register of Wills, please see the website at www.nationalwillregister.co.uk or contact a member of the Gardner Leader Wills, Probate and Estate Planning Team.

Section 9 – Funeral arrangements or any other requirements

If your specific requirements do not fit easily into this form, please contact us as it will be likely that we will need to meet with you to take your instructions and advise you further. If you have any queries regarding the distribution of your estate please detail them below. Please indicate your funeral requirements (if any) such as if you would prefer to be cremated or buried. We will then contact you to advise further.

Section 10 - Your instructions

You will be given advice by a qualified lawyer and member of the Gardner Leader Wills, Probate and Estate Planning Team who will deal with the matter personally.

Please confirm your instructions:

☐ Single Will – Please prepare a draft Will for me on the basis of the instructions contained in this questionnaire. I do not wish to meet you to provide instructions but I will meet with you to sign the Will. I understand that you will provide me with a fixed fee quote before proceeding with any chargeable work.

☐ Please contact me to arrange a meeting to discuss my Will instructions.

☐ I would like my Will to be registered on the National Will Register and agree to the additional cost as detailed in Section 8 above, if not included within my chosen pricing package.

Please provide me with further information on:

☐ Lasting Powers of Attorney

☐ Inheritance Tax Planning

☐ Trusts

Before we can proceed we will require evidence of your identity. It is a requirement that we obtain evidence of identity and address in the case of every new client and we cannot act without such verification. We need to see a passport or photo driving licence or other official document of identification together with a bill or official notification addressed to your home.

Signed: …….

Date: …….

Email Questionnaire to GL