

Initial Enquiry

Will Questionnaire

Please return the completed questionnaire to:
kate.maybury@wake-smith.com or by post to:
Kate Maybury, Wake Smith Solicitors, No.1 Velocity,
2 Tenter Street, Sheffield S1 4BY

wakesmith
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Section 1 - Personal Details

(A) You

Name:				
Telephone number and/or email address:				
Do you live, or intend to live, permanently outside England and Wales?	Yes		No	
How did you hear of Wake Smith?				

(B) Marital Status

Are you:

Single	
Married	
In a Civil Partnership	
Co-habiting	
Separated	

Divorced	
Widowed	
Do you intend to marry/remarry/enter into a civil partnership in the near future?	

(C) Your Spouse/Partner

Does your spouse/partner live, or intend to live, permanently outside England and Wales?	Yes		No	

(D) Your Children

(including children from a previous marriage or relationship, adopted children and stepchildren)

How many children do you have?				
Are any of them under 18	Yes		No	

Section 2 - Your Assets

(A) Your Home

Do you own your home:	Yes		No	
If owned is it:				
In your sole name?	Yes		No	
In joint names with your spouse/partner?	Yes		No	
In your spouse's/partner's sole name?	Yes		No	
Please give the approximate value	£			

(B) Your Business Interests

Do you own a business or have shares in a private company?	Yes		No	

(C) Other Assets

Please indicate below the approximate value of your other UK assets including any which may be owned jointly.

Property	£
Investments	£
Bank and Building Society funds	£
Other	£

(D) Your Assets Abroad (including any which may be owned jointly)

Do you have any assets outside the UK?	Yes		No	
Please give the approximate value	£			

(E) Gifts

Have you made any substantial gifts within the last 7 years, including gifts into Trusts?	Yes		No	

Section 3 - Beneficiaries

(A) Your Home

Is your estate in general to pass to your spouse/partner on your death?	Yes		No	
If the answer to the above question is yes and you survive your spouse/partner, is your estate in the main to pass to your children on your death?	Yes		No	
If the answer to either of the above questions is "No", please indicate below (in very brief, non-legal terms) how you would like to leave your estate:				
(a) If you die a single person or before your spouse/partner:				
(b) If you survive your spouse/partner:				

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