

## INSTRUCTION QUESTIONNAIRE FOR WILL

Client \_\_\_\_\_

<b>1. Date:</b>	
<b>2. Full Name and Address:</b>	
<b>3. Occupation:</b>	
<b>4. Particulars of any instructions as to funeral/grave arrangements:</b>	
<b>5. Any previous Will? Yes/No</b>	<b>If yes, where held:</b>  <b>Note: A new Will usually includes a clause which revokes the “old” Will.</b>
<b>6. Executors Names and Addresses:</b>	
<b>7. Trustees ( if different from Executors ) Names and Addresses:</b>	
<b>8. Guardians of Minor/Dependent Children Names and Addresses:</b>	
<b>9. Husband/Wife’s Name:</b>	
<b>10. Date of Marriage:</b>	
<b>11. Children: ( full name and date of birth )</b>	
<b>12. Other close next of Kin/dependents:</b>	



<p><b>15. (a) Have you already made gifts to beneficiaries to be named in the proposed Will?</b></p> <p><b>If so give details</b></p> <p><b>(b) Have appropriate returns been made to Revenue? (Particulars on separate sheet if necessary)</b></p>	
<p><b>16. (a) Have beneficiaries under proposed will received other gifts/inheritances known to you since 2<sup>nd</sup> June 1982?</b></p> <p><b>(b) If so give details</b></p>	

<p><b>17. Specific Bequests: (Give name of beneficiary and relationship to you and details of property and assets) to be left to each beneficiary:</b></p> <ul style="list-style-type: none"> <li>(a) Jewellery, special articles</li> <li>(b) Personal and household chattels generally</li> <li>(c) House and immovables</li> <li>(d) Investments etc</li> </ul>	
<p><b>18. Charitable Legacies:</b></p>	
<p><b>19. Pecuniary Legacies:</b></p>	
<p><b>20. (a) Residue (i.e. balance of estate after specific legacies)</b></p> <p><b>(b) Any division of Residue?</b></p> <p><b>(c) Trust of Residue for children?</b></p> <p><b>(d) Trust until what age?</b></p>	

<p><b>21. Correspondence to Home/Office?</b></p> <p><b>Telephone No:</b></p> <p><b>Original Will to be kept by Solicitor/Client/Bank/Other</b></p>	
<p><b>22. Any Special Requirements?</b></p> <p><b>Please use separate page if necessary.</b></p>	