



WILL QUESTIONNAIRE



**OXLEY &
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WHY MAKE A WILL

A Will is one of those things that everyone should have; and yet only about a third of people ever bother. Why should this be? Why do we need a Will anyway?

When you die your property and affairs will need to be dealt with. By making a Will you can ensure that they are dealt with in the way that you want and that any specific intentions which you have for the disposal of your home, money or possessions are carried out efficiently after your death.

“BUT I HAVE NOTHING TO LEAVE”

It is a common misunderstanding that you need to be wealthy to need a Will. This is not necessarily the case. Many people own their own house or have life assurance policies, investments, building society accounts and shares. Those assets alone could be worth very large sums of money. It would be irresponsible not to ensure that they were dealt with properly.

“BUT MAKING A WILL IS COMPLICATED”

Nothing could be further from the truth. Most Wills are straightforward. A basic Will can be prepared by us from fairly brief instructions. However, if your estate is more complicated, then we advise you of the best way to arrange your affairs to ensure everything runs as smoothly as possible for your executors and beneficiaries.

“BUT EVERYTHING WILL GO TO MY NEAREST RELATIVE ANYWAY”

Many people assume that when they die their next of kin, for example a husband, wife or child will automatically receive the whole of their estate. This is not always so.

When a person dies without having made a Will, the laws of Intestacy will apply and it is those rules which govern who gets what. For example in the case of someone who dies leaving a husband or a wife but no children, the husband or wife can find that they are sharing the estate with the spouse's brothers, sister or parents.

“BUT I HAVE MADE MY OWN WILL”

Making your own Will can be a risky business. The problem is that you will not be around to tell everyone what you really meant to say. The end result may be that either your Will fails to do what you expected it would or that it simply does not stand up legally.

If you take our advice you will have the peace of mind that comes from knowing that your estate will be dealt with as you wished.

“BUT MY SOLICITOR MADE A WILL FOR ME YEARS AGO”

You should always keep your Will under review as your circumstances change. Both marriage and divorce may cancel your existing Will. It is essential that your Will is kept up to date. Any major changes in your life could affect it.

“BUT WHO WILL CARRY OUT MY WISHES?”

An Executor is the person who will be responsible for looking after your affairs when you die and you should therefore, choose someone who you know and trust.

If, however, there is no one that you feel would be able to do this for you, then we would be pleased to act as your Executor either alone or jointly with a friend or relative.

Please read through and complete the attached questionnaire and contact Oxley & Coward Solicitors to make a mutually convenient appointment in order to discuss your Will(s). Our team of specialist solicitors will then draft your Will(s) and make all necessary arrangements for you to sign your Will(s).

Section 3 (continued)

GRANDCHILDREN

Names of present grandchildren:

Ages:

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

GUARDIANS FOR YOUR CHILDREN

Do you wish to appoint guardians for your children under the age of 18 years, if both the child's parents have died? If so, give details of the guardian(s) and address(es) below.

Mr Mrs Miss Other Title Surname:
.....
Full Forenames: Sex: Male Female
.....
Address:
.....
County: Postcode:
.....
Tel No:
.....
Marital Status: (single, married, divorced, widowed, separated.)
.....
Date of Birth: Occupation:
.....

Mr Mrs Miss Other Title Surname:
.....
Full Forenames: Sex: Male Female
.....
Address:
.....
County: Postcode:
.....
Tel No:
.....
Marital Status: (single, married, divorced, widowed, separated.)
.....
Date of Birth: Occupation:
.....

Section 4

FUNERAL ARRANGEMENTS

Give details of your funeral wishes:

Cremation:

Cremation and scatter ashes (please state where):

.....

Burial: Donate body for medical research:

Section 5

EXECUTORS

(The executor is the person or persons named by you to carry out the terms of your Will).

Please give name(s) of who you wish to act as your executor(s):

1. Full name:

.....
Address
.....
.....
Occupation
.....

2. Full name:

.....
Address
.....
.....
Occupation
.....

3. Full name:

.....
Address
.....
.....
Occupation
.....

4. Full name:

.....
Address
.....
.....
Occupation
.....

If you wish, Oxley & Coward Solicitors can act as your Executor.

Section 5 (continued)

SUBSTITUTE EXECUTORS

Please indicate whom you wish to act as Executors if both you and your spouse/partner die.

1. Full name:

Address

Occupation

2. Full name:

Address

Occupation

3. Full name:

Address

Occupation

4. Full name:

Address

Occupation

Section 6

INDIVIDUAL GIFTS

Do you wish to give a sum of money or any particular items e.g. jewellery or furniture to anyone? If so, please give details of the amount of money or a description of the item (e.g. 'my solitaire diamond ring') and the full names (and relationship to you, if any) and address of the person to receive it.

Should beneficiary inherit at a specific age? Yes No

If Yes, what age?

Is this gift to take effect only if your spouse/partner does not survive you? Yes No

1. Full name:

Address

.....

.....

Relationship

Amount/item:

.....

2. Full name:

Address

.....

.....

Relationship

Amount/item:

.....

**Please continue on a separate sheet of paper if necessary.*

Section 7

PERSONAL POSSESSIONS

Including cars, jewellery, personal effects, other household contents, etc not previously listed in Section 6.

Do you wish to provide your executors with a list of beneficiaries to whom you wish your personal possessions to be distributed? Yes No

We assume this gift will take effect only if your spouse / partner does not survive you unless notified.

Section 8

GIFT OF RESIDUE

Couples complete Part 1, others complete Part 2:

Part 1

Do you wish your spouse/partner to receive the residue? Yes No

If Yes, continue below, if no, complete Part 2

If your spouse/partner should not survive you, do you wish your children to receive the residue? Yes No

If Yes, full names or 'all my own children':

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

Is this on reaching a particular age? Yes No

If Yes, what age?

Do you wish your grandchildren to take your child's share of the residue should one of your children predecease you?

Yes No

Is this on reaching a particular age? Yes No

If Yes, what age?

Part 2

Give details of who should receive the residue of your estate (if you name more than one beneficiary, please indicate the percentage share you would want each beneficiary to inherit. If the beneficiary should only inherit on reaching a particular age, please specify your preferred age):

1. Full name:

Address:

Relationship to you:

Share:

2. Full name:

Address:

Relationship to you:

Share:

**Please continue on a separate sheet of paper if necessary.*

Section 9

SUBSTITUTE BENEFICIARY

Do you wish to nominate a beneficiary should all the beneficiaries mentioned in Section 8 predecease you?

Yes No

(if you name more than one beneficiary, please indicate the percentage share you would want each beneficiary to inherit. If the beneficiary should only inherit on reaching a particular age, please specify your preferred age)

1. Full name/charity/description:

Address:

Relationship to you:

Share:

2. Full name/charity/description:

Address:

Relationship to you:

Share:

3. Full name/charity/description:

Address:

Relationship to you:

Share:

**Please continue on a separate sheet of paper if necessary.*

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The Partners are committed to providing the best quality legal service at a reasonable price.

We provide Legal Services for:

Business Solutions

- Commercial Property
- Dispute Resolution
- Employment
- Planning
- Licensing
- Company Commercial
- E-Commerce

Individual Solutions

- Family & Children
- Wills & Probate with Care of the Elderly
- Employment Law (Employee)
- Road Traffic Offences/Crime
- Industrial Disease/Accident Compensation
- Resolving Individual Disputes
- Residential Conveyancing



For further information on 'Making a Will' or to discuss 'Making a Will', call 01709 510999 and ask for Jayne Jackson, Caroline Carter, or Ruksana Ellahi.

Alternatively, you can e-mail them on

Jayne Jackson email: jayne.jackson@oxcow.co.uk

or Caroline Carter email: caroline.carter@oxcow.co.uk

or Ruksana Ellahi email: ruksana.ellahi@oxcow.co.uk

Office Location

The offices are next to Rotherham Town Hall. There are parking facilities including disabled parking immediately outside the offices with spaces available in the car park behind the office for clients with appointments.

Office Opening

The office is open from 9.00 am to 5.00 p.m. Monday to Friday.