

Client Questionnaire



Please use additional paper where required

Your full name:

Date of birth:

Nationality:

Place of birth:

Country of Domicile:

Occupation

Address:

Contact Number:

E-mail Address:

Relationships

Are you married?

Spouses full name:

Have you been divorced/widowed?

Children

Number of Children:

Are any children under 18?

If yes, please provide guardian details below:

Would the other parent be first guardian?

Name of Substitute

Guardian:

Address of Substitute

Guardian:

Property details

Please use additional paper if more than two properties

Address:

Address:

Legal Owner(s)

Legal Owner(s)

Market value:

Market value:

Outstanding loan:

Outstanding loan:

Will

Do you have a previous Will?

If yes, please provide a copy

Executors: (The person(s) who will carry out the wishes contained in your Will)

Would you like Hadleys Wills to act as your executor?

Would you like your spouse to act as your executor?

Please provide the names and addresses of your executors. If you own property, you should specify at least two people.

Beneficiaries: (The person(s) who will receive the assets specified in your Will)

Name	Address	Gift
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Residuary Estate: Please list the details of those who you would like to receive any leftover asset that is not specified in your Will.

Name	Address
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Assets

What is the value of your main assets?

Your share in your home

Your share in other property or land

Cars and other vehicles

Home contents including furniture and fittings

Items of particular value (e.g. jewellery)

Money in banks and building societies

Shares/Investments/National Savings/Bonds

Insurance and pensions

Other savings and assets

Other Assets:

Do you have a Death in Service Scheme?

Do you own a Business?

Are you part of a Partnership?

Do you own a Farm?

Do you own any valuable digital or online assets? (e.g. eBay accounts, PayPal accounts, Domain Names)

Inheritance:

Have you received any inheritance?

Do you expect to inherit?

Past Gifts

In the last 7 years, have you made any gifts of sums of money or property, the total value of which exceeded £3,000 in any one tax year?

What are your main liabilities?

Your mortgage

Loans and overdrafts

Your credit cards

Credit or HP agreements

Other liabilities

Trusts:

Do you have any interest under a trust?

Are you a trustee?

Do you have power of appointment?

Foreign Property:

Do you own any foreign property?

Property Schedule



Address

Freehold / Leasehold

Number of Proprietors

Date of Purchase

Price Paid

Outstanding Loan?