



MACLELLAN & ASSOCIATES

Barristers & Attorneys, Notary Public

WILL QUESTIONNAIRE FORM

SECTION A

About you (please complete in all cases):

1. Surname
2. Forenames
3. Title (delete as appropriate) Mr/Mrs/Ms/Miss/Other
4. Full Address:
.....
5. Telephone: (work) (home)
6. Date of birth:
7. Occupation:
8. Marital status (circle as appropriate) Married / Single / Widowed / Divorced
Other – please specify
9. If you already have a Will, please specify who prepared it and where it is held:
.....

SECTION B

About your partner (this section must be completed if you are living with someone in a permanent relationship)

1. Your partner's full name:

2. Are you married? Yes / No

3. If you are not married are you likely to get married in the foreseeable future?

Yes / No

4. Your partner's date of birth:

5. Has your partner been married before? Yes / No

6. Does your partner have children by a previous relationship? (If so, please complete the following paragraphs) for each child (continue on a separate piece of paper if necessary) – include details of your children or any child that has been adopted by you.

Name:

Address:

Occupation:

Age:

Name:

Address:

Occupation:

Age:

Which of these children (if any) do you or your partner financially support?

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SECTION C

About your children (please complete the following paragraphs for each child. Continue on a separate sheet of paper if necessary. Please also include any child that has been adopted by you):

Name:

Address:

.....

Occupation:

Age:

Name:

Address:

.....

Occupation:

Age:

Name:

Address:

.....

Occupation:

Age:

SECTION D

About your estate:

- 1. Do you own your own house/condo? Yes / No
- Is it owned jointly with another person? Yes / No
- What is its approximate value? \$ _____
- Is it mortgaged? Yes / No
- How will the mortgage be paid off in the event of your death?
(please give details ie. insurance)

- 2. Are you self-employed or a majority shareholder in a private company?
Yes / No
If the answer to question 2 is yes, please give details
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- 3. Please give details of any property you own overseas.
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THE FOLLOWING SECTIONS RELATE TO YOUR WILL

Even in the case of a simple Will

- (i) You should appoint executors (and guardians if you have children under 18 years old). It is advisable to name at least 2 executors.
- (ii) You may wish to give cash sums or specific items to certain named beneficiaries.
- (iii) You should then say who is to inherit the remainder of your estate (that person is called your "principal residuary beneficiary").
- (iv) You should then say who is to inherit the remainder of your estate if your principal residual beneficiary dies before you.

SECTION E

Only complete if you have a spouse or partner.

1. If your spouse or partner survives you:

Do you wish to leave all your estate to him or her? Yes / No

If the answer to the above question is no, please specify what you do wish to leave to your spouse or partner.

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2. Has your spouse or partner made a Will? Yes / No

3. If your spouse or partner survives you, please tick which of the following alternatives is preferable to you:

I wish my spouse or partner to act as my only executor _____

I wish my spouse or partner to act as an executor jointly with another _____

I do not wish my spouse or partner to act as my executor _____

SECTION F

Even if you indicated in Section E that you wish your spouse or partner to act as your sole executor, you will still have to name executors in case your spouse or partner dies before you or is unable, for whatever reason, to act as an executor.

- 1. Do you wish an executor company to act as your executor?

Yes / No

- 2. Do you wish for an executor company to act as your executor jointly with a friend or relative or in the alternate event that your husband, wife, partner, friend or relative dies before you?

Yes / No

- 3. Please give full names and addresses of two executors:

First executor's name:

Address:

.....

Occupation:

Relationship to you:

Second executor's name:

Address:

.....

Occupation:

Relationship to you:

SECTION G

To be completed if you have children:

1. Guardians

If you have children under the age of 18, you should consider carefully appointing a guardian to look after them in case you die leaving them with no surviving parent to look after them. If you wish to appoint a guardian, please complete the following details about the person you wish to appoint after you have discussed the matter with these persons (please note that being the guardian of another person's child carries with it a lot of responsibility). It is often sensible to appoint as the second guardian the husband or wife of the first guardian.

First guardian's name:

Address:

.....

Occupation:

Relationship to you:

Second guardian's name:

Address:

.....

Occupation:

Relationship to you:

2. Are your children your stepchildren? Yes / No

Are they the children of both you and your spouse/partner? Yes / No

3. Indicate whether you wish your children to inherit your residuary estate after your partner (or should your partner predecease you) Yes / No

4. In what shares are the children to inherit your estate?

<u>Name</u>	<u>Age</u>	<u>Share %</u>
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5. Until they are 18 the law directs that any property held for the benefit of children must be retained by the executors for their benefit until they each attain that age. If you wish to postpone that until 21, 25 or any other age, please specify.

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SECTION H

1. Specify gifts you may wish to include in your Will. Gifts may include gifts or cash or personal or household items to certain named persons or charities. If so, please give details (continue on a separate sheet if necessary):

<u>Person who is to receive gift</u>	<u>Details of gift *</u>
Name:	Gift(s)
Address:	
Name:	Gift(s)
Address:	
Name:	Gift(s)
Address:	

* Please indicate with a tick which, if any, of the items mentioned above are to be given to the person named even if your spouse or partner survives you.

2. After all your debts, liabilities, taxes etc have been paid and the gifts mentioned in part 1 above have been handed to the person mentioned what is left over is called 'your residuary estate'. In clause 1 of Section E you may have indicated that you want your spouse or partner to receive everything and in Section G your children but in case he/she may die before you or in case you have no spouse or partner and if your children predecease you without issue, it will be necessary in all cases to say who (ie. nephews, nieces, or charity) is to receive your residuary estate. If more than one person or charity is to share in your residuary estate please indicate below by stating the percentage share each person or charity is to receive:

Name:

Address:

.....

Relationship to you:

Share %

Age to benefit (see note 1)

Name:

Address:

.....

Relationship to you:

Share %

Age to benefit (see note 1)

Note 1

If the persons named are not to receive their share of your estate until they have reached a certain age, please say at what age they are to benefit otherwise they will receive it at age 18.

Note 2

Please say what is to happen to a person's share if the person named dies before you.

- For example: (a) are that person's children to receive his/her share? or
- (b) is that person's share to be divided between the other named beneficiaries?

SECTION I

Complete in every case:

1. Do you wish to give specific directions for medical care should you be unable to give directions yourself?

Yes / No

If yes, please state directions:

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2. Do you wish to donate your body's organs? Yes / No

3. Any specific directions for funeral arrangements, cremation or the disposal of your body or ashes?

Yes / No

If yes, please state directions:

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