

**WILL QUESTIONNAIRE**

Will questionnaire

and instruction form

**IS THIS SERVICE SUITABLE FOR ME?**

A will is a vital document that regulates the succession of your estate and we need to ensure that this service is appropriate for you.

If you answer yes to any of the following questions, or you consider your personal circumstances to be more complicated for any reason, then this service may not be suitable for you and we recommend that you arrange a meeting with a solicitor to discuss your requirements in more detail.

Our Private Client team can be contacted by email at (**privateclient@gilsongray.co.uk**) or on **0131 516 5354** (Edinburgh), **0141 530 2021** (Glasgow) or **01620 893 481** (North Berwick)to book an initial meeting to discuss your personal affairs in greater detail.

\* Is the value of your estate (including gifts made within the last seven years) after the deduction of debts and liabilities (such as a mortgage) over the inheritance tax threshold of £325,000? Choose an item.

\* Do you wish to establish a trust for young beneficiaries or beneficiaries that require financial protection, have a disability or suffer from substance abuse problems? Choose an item.

\* Do you wish to disinherit a family member such as a child, spouse or civil partner? Choose an item.

\* Is a potential beneficiary in receipt of means tested benefits, and could an inheritance affect his or her entitlement? Choose an item.

\* Is someone, such as a family member, likely to challenge your will? Choose an item.

\* Are you considering protecting your estate from care home fees? Choose an item.

\* Do you own property or assets situated outside the United Kingdom? Choose an item.

\* Do you own or have an interest in a private business, partnership or farm? Choose an item.

If you have answered no to all the questions above please continue with this form.

**STEP**

**1**

Personal details

Please read the guidance notes below and complete the appropriate data fields to confirm your instructions regarding your will. The fields marked with **\*** must be completed.

Your client reference or referral number (if known): Click here to enter text.

\* Your full legal name (This will be the same name as shown on your passport, e.g. Susan Mary Smith): Click here to enter text.

\* Your home address (e.g. 12 Castle Street, Anytown, AB1 2TG): Click here to enter text.

\* Your telephone number: Click here to enter text.

\* Your email address: Click here to enter text.

**STEP**

**2**

**STEP**

**2**

Appointment of

your executors

**APPOINTMENT OF EXECUTORS GUIDANCE**

Your executors are responsible for winding up your affairs and distributing your estate in accordance with the terms of your will. You should appoint more than one executor in case your chosen executor cannot act for any reason. If you wish to appoint more than one executor please indicate whether the additional executor is to be appointed jointly, or will only act if you first executor is unable or unwilling to act.

You may wish to appoint our professional trustee company (Gilson Gray Nominees Limited) as an executor. Our professional trustee company does not charge a fee for acting as an executor.

Once you have chosen how you would like your executors to be appointed please add the required details to the spaces provided.

\*How would you like your executor or executors to be appointed? Choose an item.

**Executor 1\***

Full Name: Click here to enter text.

Address: Click here to enter text.

**Executor 2**

Full name: Click here to enter text.

Address: Click here to enter text.

**Executor 3**

Full name: Click here to enter text.

Address: Click here to enter text.

**STEP**

**3**

Appointment

of Guardians

**APPOINTMENT OF GUARDIANS GUIDANCE**

Children attain the age of legal capacity in Scotland at 16. You may wish to appoint a guardian to look after your children if both of the child’s parents or legal guardians die and the child is under the age of 16. If you appoint two guardians they will be appointed jointly.

Would you like to appoint a guardian or guardians?

\*I Choose an item.

**Guardian 1**

Full name: Click here to enter text.

Address: Click here to enter text.

**Guardian 2**

Full name: Click here to enter text.

Address: Click here to enter text.

**STEP**

**4**

Legacies

**STEP**

**2**

**LEGACIES GUIDANCE**

If you want to leave a specific sum of money to a named individual please add his or her name and the amount that you want to bequeath in this section.

If the chosen beneficiary fails to survive you, then his or her legacy will form part of the residue of your estate described below.

If you are bequeathing money to a charity please include the charity number in the same box as the name. For example:

**Full Name: “ABC Charity (SC123456)”**

\*Would you like to bequeath a cash legacy? IChoose an item.

If so, please complete the following section based upon your selection.

**Legacy Beneficiary 1**

Full name: Click here to enter text.

Address: Click here to enter text.

£ Click here to enter amount. (for example £10,000)

**Legacy Beneficiary 2**

Full name: Click here to enter text.

Address: Click here to enter text.

£Click here to enter amount.

**Legacy Beneficiary 3**

Full Name: Click here to enter text.

Address: Click here to enter text.

£Click here to enter amount.

**STEP**

**5**

Who would you like to inherit

the residue of your estate

**GUIDANCE ABOUT THE DISTRIBUTION OF YOUR ESTATE**

After your executors have settled all debts, funeral expenses and legacies mentioned above, the remainder of your estate is known as the “residue”. You can leave it to one or more individuals or to a charity – the choice is yours.

When considering the distribution of your estate the following points should be noted:

1. Your instructions below may not apply to your home (or other assets such as an investment account) if the title is held jointly with what is known as a “special destination” or a “survivorship destination”. If your title deeds for your home contain what is known as a survivorship destination (normally written in the title deeds as “to A and B and to the survivor of them”) then the property will pass automatically to the survivor on death and this will take priority over the terms of your will. Please send to us a copy of your title deeds if you would like us to check the position.
2. Some assets such as pensions may fall outwith your estate and are not affected by the terms of your will. You should check with the pension provider to confirm how your pension is affected in the event of your death.
3. The concept of legal rights exists in Scotland so that a person’s spouse, civil partner or children cannot be completely disinherited. In the event of a surviving spouse (or civil partner), he or she will have a legal rights entitlement to a share of the net moveable estate. Generally, the term ‘moveable estate’ includes all assets except land and buildings (except those used in a business). If there are surviving children the share will be one-third, but this increases to one-half if there are no surviving children.
4. Children will collectively have an entitlement to a share of the net moveable estate. If there is a surviving spouse or civil partner the share will be one-third, but this increases to one-half if there is no surviving spouse or civil partner.
5. Legal rights will apply even if you put in place a will.

\*Which option best describes how you would like your estate to be divided? I would like the residue of my estate to be made over to Choose an item.

If the residue of your estate is to be made over to your spouse or civil partner or significant other please include his or her details below.

**Spouse or civil partner or significant other**

Full name: Click here to enter text.

Address: Click here to enter text.

Gender: Choose an item.

**STEP**

**5**

Who would you like to inherit

the residue of your estate

If you have selected “other named individual or individuals” above please complete the section below and confirm what share of your estate he, she or they should receive.

**Residuary Beneficiary 1**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text.%

**Residuary Beneficiary 2**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text.%

**Residuary Beneficiary 3**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text. %

*Please ensure the percentage shares above add up to 100%*

If a residuary beneficiary named above fails to survive you would you like his or her share to be made over to his or her children and other future generations? Choose an item.

If a beneficiary named above fails to survive without children would you like his or her share to be divided equally between the remaining beneficiary or beneficiaries named in this section? Choose an item.

**STEP**

**6**

Fallback beneficiary

**ADDITIONAL OR FALLBACK BENEFICIARY GUIDANCE**

If all of the beneficiaries named above fail to survive you then your estate will be distributed in terms of the default laws of succession and may include beneficiaries whom you do not wish to benefit. Please provide details of a fallback beneficiary or beneficiaries to help prevent this from happening.

**CHOICE OF FALLBACK BENEFICIARY OR BENEFICIARIES**

\*I wish to includeChoose an item.

**Fallback Beneficiary 1**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text. % (for example 33.3%)

**Fallback Beneficiary 2**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text. % (for example 33.3%)

**Fallback Beneficiary 3**

Full name: Click here to enter text.

Address: Click here to enter text.

Percentage share: Click here to enter text. % (for example 33.4%)

**STEP**

**7**

Funeral instructions

**FUNERAL INSTRUCTIONS**

Do you want your body to be buried or cremated? Choose an item.

**STEP**

**8**

Confirm instructions

and accept terms

I Choose an item. to Gilson Gray LLP’s terms and conditions. I declare that I am providing instructions to prepare my will and the information provided in this form has been completed to the best of my knowledge.

Please send the completed form by email to

privateclient@gilsongray.co.uk

Please note that we cannot accept a handwritten form.