

Inheritance Planning Questionnaire

Please complete the following - where there is insufficient space and/or you have queries or unusual circumstances, please use Section 13.

Please note that the responses that you give may lead us to ask further questions.

1 NAME AND ADDRESS

Name
Address

Date of birth *dd/mm/yyyy*
Any illness or other circumstances that may be relevant:

2 FAMILY

Married/civil partner	Yes / No	<i>Indicate if widowed</i>
Number of children		
Number of dependants - minor children and ages		
Number of grandchildren/great grandchildren		
Other - e.g. ailing parents, etc.		

3 ASSETS

Please give a FULL value of assets in the left-hand column and amount of any mortgage/loan on that asset in the centre column. Where relevant, please show the percentage owned of the asset so we can apportion the value.

	Value £	Liabilities £	Owned %
Main residence	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ownership - <u>s</u> ole/ <u>j</u> oint tenants/ <u>t</u> enants in common			
Other property	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ownership - <u>s</u> ole/ <u>j</u> oint tenants/ <u>t</u> enants in common			
Shares in family companies - value	<input type="text"/>	<input type="text"/>	<input type="text"/>
- Number of shares			<input type="text"/>
- Percentage owned			<input type="text"/>
Shares in partnerships	<input type="text"/>	<input type="text"/>	<input type="text"/>
Agricultural property - land	<input type="text"/>	<input type="text"/>	<input type="text"/>
- other	<input type="text"/>	<input type="text"/>	<input type="text"/>

3 ASSETS cont'd	Value £	Liabilities £	Owned %
Quoted shares/other e.g. Unit Trust			
Bank accounts - balance			
Insurance policies			
Interests in settlements			
Cars, jewellery and collections			
Chattels - furniture, etc			
National savings			
ISAs etc			
Cash/other, please give details in Section 12			

If we assist in the completion of your tax return, please ignore questions 4, 5 and 6.

4 INCOME	£
Please give details of your income in the latest year for which you have records. This may be found on forms P60, P11d, etc	
Salary from employment	
Benefits in kind (cars, private medical insurance, etc.)	
Occupational and other pension income	
State pension	

5 INVESTMENT INCOME	
Interest from bank accounts	
Interest from Unit Trusts, gilts, etc	
Other interest - NS&I etc.	
Rental income	
Dividends on shareholdings	
Other dividends	
Other - please specify	

6 INCOME FROM TRUSTS
Are you the beneficiary of a Trust? Yes / No
If yes, we will need to ask for further information and review documents.

7 EXPECTATIONS

Please give details of property or money that you expect to inherit or any large gifts that you expect to receive.

If you have an idea of when you may receive the inheritance/gift, please give full details:

8 MONTHLY SURPLUS INCOME

£

Approximate amount

9 WILLS

Have you made a Will?

Has your spouse/civil partner made a Will?

Please provide a copy of your most recent Will.

Please give details of any major life events since you signed your Will, for example marriage, separation/divorce, birth of a child, major illness or disability of you or your spouse, death of an executor.

In certain circumstances a particular life event may make the original Will less efficient or even invalid.

10 LIFETIME GIFTS

Please give full details of any pecuniary or other gifts to individuals within the last seven years and continue at Section 12 if necessary.

Date

To whom/relationship to donee

Amount

Date

To whom/relationship to donee

Amount

Date

To whom/relationship to donee

Amount

11 SETTLEMENTS

Have you settled assets/funds into trust(s)?

Yes / No

If you have settled assets or funds into a trust/trusts, we will need to ask for further information and review documents.

12 PENSIONS

Please give details below of any pensions you hold and their current value.

13 ADDITIONAL INFORMATION

Please give details below of any other information that you feel may be relevant.