

# IMPORTANT INFORMATION

## **MIRROR WILLS (2 x Matching Wills)**

A Mirror Will is a second Will reflecting your wishes but adapted for your Partner and is ideal for couples who want the same things.

e.g. Each other inherit 100%, then agreed alternatives.

If you and your Partner have different wishes or different people you want to name in your Will, then you EACH need a SINGLE WILL and both need to complete a separate Questionnaire.

## **THIS QUESTIONNAIRE CANNOT BE USED AS A WILL**

The information you provide by completing this Questionnaire is simply a record of your wishes which we use to professionally write your Will.

## **EXCLUSIONS**

If you are not making provision for a husband / wife / partner / former husband or wife, or a child or other dependant, it is possible that he or she could make a claim against your Estate. Please seek further advice from us if you wish to exclude someone that may have a claim on your Estate.

## CONFIDENTIAL QUESTIONNAIRE

Please write using **BLOCK CAPITALS** and write **NAMES** (NOT INITIALS)  
and do not write shortened names e.g. **ROB, SUE, JIM** etc.

Please note that the term 'Partner' used in this Questionnaire can refer to your spouse  
(husband/wife), your civil partner or cohabitee of either gender.

### SECTION A

#### YOUR DETAILS

Title:
Surname:
First Name(s):
Alias (if any):
Date of Birth:
Address:
Post Code:
Daytime Telephone Number(s):
Your Current Status (delete as appropriate):  SINGLE / MARRIED / CIVIL PARTNER / LIVING WITH PARTNER /  DIVORCED / WIDOWED
Do you OWN a business or are you in a business PARTNERSHIP    YES / NO
Do you OWN any assets which are located outside of the UK        YES / NO

#### YOUR PARTNER'S DETAILS

- ONLY required if you and a Partner require MIRROR WILLS -

Title:
Surname:
First Name(s):
Alias (if any):
Date of Birth:
Your Current Status (delete as appropriate):  SINGLE / MARRIED / CIVIL PARTNER / LIVING WITH PARTNER /  DIVORCED / WIDOWED
Do you OWN a business or are you in a business PARTNERSHIP    YES / NO
Do you OWN any assets which are located outside of the UK        YES / NO

**SECTION B**

**FIRST CHOICE OF EXECUTOR(s)**  
We recommended that you appoint a minimum of Two Executors including a Professional Executor.  
  
To appoint ourselves as a Sole or a Joint Executor, simply write 'ASK Legal Services' in the relevant 'Name' box and your Will is drafted free of charge.

EXECUTOR 1. Full Name:
Address:
Relationship:
JOINT EXECUTOR 1.Full Name:
Address:
Relationship:

**ALTERNATIVE EXECUTOR(s)**  
**(OPTIONAL)**  
If you wish to appoint alternative Executor(s) to the above, these choices will ONLY act if your first choice Executor(s) above cannot or does not wish to act.

Alternative EXECUTOR Full Name:
Address:
Relationship:
Alternative JOINT EXECUTOR Full Name:
Address:
Relationship:

## SECTION C

### APPOINTMENT OF GUARDIAN(s)

This section is **ONLY** applicable if you have children under the age of 18 years

#### MIRROR WILLS

Please indicate if any child named below is from a previous relationship or your Partner's child from a previous relationship.

The choice of Guardian made below Will apply to both Mirror Wills. If you or your Partner wish to appoint different Guardians for different children then you each need a SINGLE WILL.

### DETAILS OF CHILDREN UNDER 18 yrs old.

If you or your Partner have children that you wish to EXCLUDE from Your Will, please seek our advice.

Name:	Age:
Name:	Age:
Name:	Age:
Name:	Age:
Name:	Age:
Name:	Age:

### 1st CHOICE OF GUARDIAN

Please state the relationship of a Guardian to YOU, not the relationship to your Children.

GUARDIAN Full Name:
Address:
Relationship:

### ALTERNATIVE GUARDIAN

If your First Choice named above cannot or does not wish to act.

GUARDIAN Full Name:
Address:
Relationship:

## SECTION D

### SPECIFIC GIFTS (OPTIONAL)

Gift of a particular asset or a specific amount of money to be given separate from the gift of your main Estate.

If you wish to leave several Gifts of small value personal and/or household items, it is advisable to write a 'Separate List' (called a Memorandum of Wishes) which is kept together with your Will. This has the advantage that you can alter and update the List without having to alter your Will.

If you only wish to leave a 'SEPARATE LIST' of Gifts, TICK HERE  AND >> GO TO THE NEXT SECTION >> (Section 'E').

If you wish to include Specific Gifts TO BE INCLUDED IN THE WILL, supply details below:

#### **GIFT(s) TO BE INCLUDED IN THE TEXT OF MY WILL:**

GIFT	GIFT
£ / AMOUNT IN WORDS:	£ / AMOUNT IN WORDS:
or ITEM:	or ITEM:
Name:	Name:
Address:	Address:
Relationship:	Relationship:

GIFT	GIFT
£ / AMOUNT IN WORDS:	£ / AMOUNT IN WORDS:
or ITEM:	or ITEM:
Name:	Name:
Address:	Address:
Relationship:	Relationship:

GIFT	GIFT
£ / AMOUNT IN WORDS:	£ / AMOUNT IN WORDS:
or ITEM:	or ITEM:
Name:	Name:
Address:	Address:
Relationship:	Relationship:

**SECTION E**

**DISTRIBUTION OF RESIDUE**

**(Residue is your total Estate, LESS debts, funeral expenses and any Specific Gifts)**

Instead of writing individual names and addresses, you may state general 'categories' of Beneficiaries e.g. 'EQUALLY BETWEEN MY CHILDREN' – 'EQUALLY BETWEEN MY BROTHERS AND SISTERS' etc.

**Please state your 1<sup>st</sup> Choice Beneficiary(s) BELOW:**

(Indicate whether the Beneficiary is to receive an EQUAL SHARE or some other percentage. If using percentages, they must add up to 100%).

<b>1.</b>
Full Name:
Address:
Relationship: EQUAL SHARE or _____%
<b>2.</b>
Full Name:
Address:
Relationship: EQUAL SHARE or _____%
<b>3.</b>
Full Name:
Address:
Relationship: EQUAL SHARE or _____%
<b>4.</b>
Full Name:
Address:
Relationship: EQUAL SHARE or _____%
<b>5.</b>
Full Name:
Address:
Relationship: EQUAL SHARE or _____%

## SECTION F

### ALTERNATIVE DISTRIBUTION OF RESIDUE

If the Beneficiary(s) as named in SECTION 'E' dies before you (or at the same time as you).

**This Section is OPTIONAL but recommended if you have named only One Beneficiary in SECTION 'E'.)**

Instead of writing individual names and addresses, you may state general 'categories' of Beneficiaries e.g. 'EQUALLY BETWEEN MY CHILDREN' – 'EQUALLY BETWEEN MY BROTHERS AND SISTERS' etc.

#### Please state your 2<sup>nd</sup> Choice Beneficiary(s) BELOW:

(Indicate whether the Beneficiary is to receive an EQUAL SHARE or some other percentage. If using percentages, they must add up to 100%).

<b>1.</b>	
Full Name:	
Address:	
Relationship:	EQUAL SHARE / _____%
<b>2.</b>	
Full Name:	
Address:	
Relationship:	EQUAL SHARE / _____%
<b>3.</b>	
Full Name:	
Address:	
Relationship:	EQUAL SHARE / _____%
<b>4.</b>	
Full Name:	
Address:	
Relationship:	EQUAL SHARE / _____%
<b>5.</b>	
Full Name:	
Address:	
Relationship:	EQUAL SHARE / _____%

## SECTION G

### FUNERAL WISHES

(Optional)

Tick against the appropriate choice

YOUR CHOICE

YOUR PARTNER'S CHOICE

(If applicable)

CREMATED

CREMATED

BURIED

BURIED

### CONGRATULATIONS...

**By completing this Questionnaire you have taken an important step closer to the real peace of mind of a professionally drafted Will.**

*"Nobody regrets writing a Will –*

*Thousands regret that someone close didn't"*

***To move forward to the next stage please scan and email the completed Questionnaire to us (or fax). If you can't do this from home you can ask a friend or visit an Internet Café (or some public Libraries).***

***If you have not appointed us as your first choice of Executor we will contact you for payment of just £39 plus VAT for a single Will or £48 plus VAT for a pair of Mirror Joint Wills.***

***We look forward to hearing from you shortly.***

[www.probate-helper.co.uk](http://www.probate-helper.co.uk)