

## MITCHELLS WILL QUESTIONNAIRE

*If you would prefer to speak with someone direct, please contact our Private Client Solicitor, Georgina Jones, on 01904 623751*

### 1. PERSONAL DETAILS

**FULL** name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone (home) \_\_\_\_\_ (work) \_\_\_\_\_ (mobile) \_\_\_\_\_

Family:

Spouse/Partner \_\_\_\_\_

Children name and address and (if under 18) age

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dependants: name and address and (if under 18) age

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other people to be considered: name and address and (if under 18) age

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**2. ASSETS AND APPROXIMATE VALUES**

Do you own your own home?    yes/no    Value £\_\_\_\_\_

Details of ownership (joint/sole owner; share owned; other parties involved; joint tenants/tenants in common; mortgage outstanding; life cover for mortgage etc)

---

---

---

Details as above for any other land/ houses/ buildings owned or leased

---

---

---

Do you own a business?    yes/no    Type \_\_\_\_\_

Company/partnership/sole trader    Value £\_\_\_\_\_

Details of ownership (joint/sole owner; share owned; other parties involved; loans outstanding; property owned by business or owned by you and used by business; life cover for business debts etc) \_\_\_\_\_

---

---

---

Other assets: Shares    £\_\_\_\_\_    Bank Accounts    £\_\_\_\_\_

Life Policies    £\_\_\_\_\_    Pensions    £\_\_\_\_\_

Other    £\_\_\_\_\_

Debts:    Credit Cards    £\_\_\_\_\_    Family Loans    £\_\_\_\_\_

Other Loans    £\_\_\_\_\_

**3. WILL PROVISIONS**

Proposed Executor(s) (your Executors will be responsible for dealing with your affairs after your death and must be over the age of 18): name and address

---

---

Substitute Executor: \_\_\_\_\_

---

Guardian of children under 18: name and address \_\_\_\_\_

---

Substitute Guardian: \_\_\_\_\_

---

Specific Gifts (money/items to people/charities) \_\_\_\_\_

---

---

Residuary Gifts (this is the whole of your estate apart from specific gifts above, if you wish to leave your estate to anyone under the age of 18 you must decide at what age they are to inherit and you will need at least 2 Executors to act as Trustees until that age) \_\_\_\_\_

---

---

Substitute Residuary Gifts \_\_\_\_\_

---

---

Funeral Wishes \_\_\_\_\_

---

#### 4. LIFETIME PROVISIONS

Your Will only takes effect after your death. You may wish to consider making provision to deal with assets by way of gift during your lifetime whether absolutely or by creating a trust. You should also consider appointing someone (or more than one person) to act for you under a Lasting Power of Attorney in the event that you become unable to manage your own affairs due to ill health/accident/old age.

Have you set up any lifetime trusts?      yes/no

If so, please give details \_\_\_\_\_  
\_\_\_\_\_

Do you wish to discuss lifetime trusts/gifts?      yes/no

Have you made a Power of Attorney?      yes/no

If so, who have you appointed to act for you? \_\_\_\_\_  
\_\_\_\_\_

If not, would you like to discuss it further?      yes/no

Who do you think you might like to appoint? \_\_\_\_\_  
\_\_\_\_\_

***Please return the completed form to:***

***Georgina Jones***

***Solicitor***

***Mitchells***

***2 Peckitt Street***

***York***

***YO1 9SF***

***Or to make an appointment:***

***telephone: 01904 623751***

***e-mail: ghjones@mitchellssolicitors.co.uk***