

WILLS QUESTIONNAIRE

Please complete as much of the below as you can and bring with you to your appointment.

	Full Name (including aliases) :	
	Address:	
	Occupation:	
	Contact telephone numbers:	
	Date of Birth:	
	Were you born in the Isle of Man? <i>If not, please give date when you moved to the Isle of Man and also details of your former domicile</i>	
Note 1	Burial/Cremation: <i>Please give details if you have any specific burial or cremation wishes</i>	
	Marital status: <i>If not married, do you have any intention to marry in the near future?</i>	
	Full name of spouse/partner:	
	Names and ages of children of present marriage/relationship:	
Note 2	Have you or your spouse / partner been married before?	Yes / No
	Please give details of names and ages of children of previous marriage/relationship of yourself and your spouse/partner:	
	Self:	
	Spouse/Partner:	
	Is this Will intended to cover your Isle of Man or worldwide assets?	
	Have you ever made a will before? If so, where is it held?	
Note 3	NAMES AND ADDRESSES OF EXECUTORS:	
	First Executor: Full Name Address	
	Second Executor: Full Name Address	
	SUBSTITUTE EXECUTOR(S):	
	Full Name Address	

	GUARDIANS
First Guardian: Full Name Address	
Second Guardian: Full Name Address	
Substitute Guardian: Full Name Address	
Note 5	MONETARY GIFTS: <i>(Please specify amount and full names and addresses of intended beneficiaries and if a minor, at what age they are to inherit)</i>
Note 6	SPECIFIC GIFT OF PROPERTY / ITEM / GIFT: <i>(please specify property and full names and addresses of intended beneficiaries and if a child at what age it will be gifted)</i>
Note 7	RESIDUE OF YOUR ESTATE: <i>(please specify full names and addresses of intended beneficiaries and if a child or children at what age they are to inherit) Please also confirm whether if one of the named beneficiaries should die, whether you want their share to go to their child(ren)</i>
Note 8	SUBSTITUTE BENEFICIARIES OF RESIDUE: <i>(please specify all names and addresses)</i>

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Note 9

At what age do you wish children to inherit residue?	
Name:	Age:
Name:	Age:
Name:	Age:
Name:	Age: