

French Estate Planning questionnaire

Client 1 (full name): _____

Client 2 (full name): _____

Your Details

Client 1:

Title: Mr / Mrs / Ms / Miss / Dr / Other
Maiden/previous name:
Date of Birth:
Place of Birth:
Address:
Tel:
Mobile:
Email:
Occupation:
Nationality/nationalities:

Client 2:

Title: Mr / Mrs / Ms / Miss / Dr / Other
Maiden/previous name:
Date of Birth:
Place of Birth:
Address:
Tel:
Mobile:
Email:
Occupation:
Nationality/nationalities:

Marital/Civil Partnership Status

Client 1:

Marital Status:
Date of Marriage/Civil Partnership:
Place of Marriage/Civil Partnership:
If Divorced, please confirm date and court where Decree Absolute was granted: Date: Court:
If widowed, please confirm date and place of spouse's death: Date: Place:

Client 2:

Marital Status:
Date of Marriage/Civil Partnership:
Place of Marriage/Civil Partnership:
If Divorced, please confirm date and court where Decree Absolute was granted: Date: Court:
If widowed, please confirm date and place of spouse's death: Date: Place:

Children

If you have children please give their details below, including adopted or estranged children. If any children are from another relationship please confirm the name of the other parent/s (continue on a separate sheet if necessary):

Child 1:

Surname:
Date of birth:
Place of Birth
Marital Status:

Forenames:
Is this child from another relationship? Yes / No
If Yes; Name of both parents:

Children (continued)

Child 2:

Surname:
Date of birth:
Place of Birth
Marital Status:

Forenames:
Is this child from another relationship? Yes / No
If Yes; Name of both parents:

Child 3:

Surname:
Date of birth:
Place of Birth
Marital Status:

Forenames:
Is this child from another relationship? Yes / No
If Yes; Name of both parents:

Child 4:

Surname:
Date of birth:
Place of Birth
Marital Status:

Forenames:
Is this child from another relationship? Yes / No
If Yes; Name of both parents:

Grandchildren

Do you have any grandchildren? If yes, please give us their details (continue on a separate sheet if necessary)

Grandchild 1:

Surname:	Forenames:
Date of birth:	Name of parent/s:
Place of birth:	
Marital Status:	

Grandchild 2:

Surname:	Forenames:
Date of birth:	Name of parent/s:
Place of birth:	
Marital Status:	

Grandchild 3:

Surname:	Forenames:
Date of birth:	Name of parent/s:
Place of birth:	
Marital Status:	

If you do not have any children, please confirm if you have surviving parents:

Mother

Client 1:

Surname:

Forenames:

Date of Birth:

Client 2:

Surname:

Forenames:

Date of Birth:

Father

Client 1:

Surname:

Forenames:

Date of Birth:

Client 2:

Surname:

Forenames:

Date of Birth:

Your intentions

Your overall intentions and questions of permanent residence and domicile can all be relevant in assessing your estate planning position. 'Domicile' itself is a concept that may differ between English and French laws, which may also therefore need consideration.

Are you planning to move to France on a permanent basis? Yes / No

If you already live in France, what date did you move there?

Where do you consider yourself domiciled?

Where do you pay income tax, if at all?

The French Property

If you already own a property in France, please answer all questions below as fully as you can. If you are currently in the process of purchasing, please let us have a guide to the estimated value of the property. If you already own your property please provide us with a copy of the title documentation.

What is the value of the property?

What is the value of the contents of the French property?

In what form do (will) you own your French property jointly, via a company or alone, and if you already own it, is there a tontine clause or have you completed a change of matrimonial regime?

General Matters

For the following please note it may not always be possible to put into place exactly what you would want under French law, including excluding certain beneficiaries, but please confirm your wishes.

Who do you intend to be the beneficiary/ies* of your French Property:

**Please state the full name, and date and place of birth of these beneficiaries if you have not already provided these details elsewhere in the questionnaire.*

Client 1:

If you are the first partner to die:

If you are the second partner to die:
(i.e. your partner predeceases you)

Client 2:

If you are the first partner to die:

If you are the second partner to die:
(i.e. your partner predeceases you)

General Matters (continued)

Do you have any family members you wish to exclude from your French Estate? If yes, please provide us with their name and relationship to you (continue on a separate sheet if necessary)

Client 1:

Name and Relationship:

Client 2:

Name and Relationship:

Client 1:

Do you wish to make any specific legacies?

Will your beneficiaries have sufficient liquid assets when you die to be able to pay French inheritance tax without being forced to sell the French property?

Client 2:

Do you wish to make any specific legacies?

Will your beneficiaries have sufficient liquid assets when you die to be able to pay French inheritance tax without being forced to sell the French property?

Your other assets

It is important for us to know the value of your other assets to enable us to give you the best advice. Please complete the table below with the relevant values.

ASSET	JOINT	CLIENT 1	CLIENT 2
French bank account(s):			
UK home:			
UK home content (re-sale value rather than insurance/replacement value):			
Other UK property e.g. rental properties:			
Other UK property contents (re-sale value rather than insurance/replacement value):			
Other worldwide assets e.g. bank accounts, investments etc: Please specify the type of asset as well the value			

Other matters

Client 1:

Do you already have a French Will?

Yes / No

If yes, who holds the original?

Client 2:

Do you already have a French Will?

Yes / No

If yes, who holds the original?

If yes, please forward a copy of your French Will to Matthew Cameron at the address below.

Client 1:

Do you already have a UK Will?

Yes / No

If yes, who holds the original?

Client 2:

Do you already have a UK Will?

Yes / No

If yes, who holds the original?

If yes, please note that by purchasing a French Home, it is possible that your UK Will would need to be amended. Please forward a copy of your UK Will to:

Ashtons Legal
The Long Barn
Fornham Business Court
Fornham St Martin
Bury St Edmunds
IP31 1SL