

private client questionnaire PART ONE

personal details

Title: (Mr/Mrs/Ms/Other):	Full Postal Address:
Surname:	
Forename(s):	
Former/Other/Maiden Names:	
Home telephone no:	
Mobile no:	
Date of birth:	
Place of birth:	
E-mail:	
Do you prefer to receive correspondence by post or by e-mail?	
Occupation:	Nationality/nationalities:
<p>Domicile:</p> <p>Are you intending to move to France permanently? YES / NO</p> <p>If you already live in France, what date did you move?</p> <p>Where do you consider yourself domiciled?</p> <p>Where do you pay income tax, if at all?</p>	

Have you previously made one or more of the following documents:

UK Will (Please provide a copy)	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location
Foreign Will (Please provide a copy)	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location
Enduring Power of Attorney	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location
Property & Affairs Lasting Power of Attorney	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location
Personal Welfare Lasting Power of Attorney	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location
Advance Decision (Living Will)	<input type="checkbox"/> Y	<input type="checkbox"/> N	Date	Location

If you have not been a client of Ashtons Legal previously, how did you hear of Ashtons Legal?

private client questionnaire PART TWO

Marital/Civil Partnership status

Marital Status:

Are you expecting to marry/enter into a civil partnership in the near future, if so please give details

Date of Marriage/Civil Partnership:

Place of Marriage/Civil Partnership:

Place of first habitual residence after marriage:

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:

family details

Your Children

Please give full names, addresses (if different from your own) and dates and places of birth of your children. Include here children adopted by you and any stepchildren and any other children who are treated as children of the family. Please give details of any parent other than yourself and your partner:

Name of Child	Address	Date and place of Birth	Parents if not you and your current partner
Marital status:			
Marital status:			
Marital status:			
Marital status:			
Marital status:			
Marital status:			
Marital status:			

family details (continued...)

Grandchildren (Please give details of your grandchildren and indicate who the parents are)

Name of Child	Address	Date and place of Birth	Name of Parents
Marital status:			
Marital status:			
Marital status:			
Marital status:			
Marital status:			

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

Mother	Father
Surname: Forenames: Date of Birth:	Surname: Forenames: Date of Birth:

family details (continued...)

Other Relevant Information

If we are being instructed to prepare a Will or Lasting Power of Attorney it is important that we are aware of family history that may be relevant to decisions that you may make. For example you may decide in your will not to make provision for someone who in the normal course of events may be expecting to benefit, such as a child. Please give any details here:

Do any members of you or your or spouses/partners family have any special educational or medical needs or are they unable to or be unlikely to be able to live and maintain themselves independently in adulthood? Please give details:

Please give details of any serious medical conditions of either you or your partner:

assets and tax (continued...)

Assets

In client's sole name

**Joint
Name:**

<p>Personal belongings and Vehicles</p>		
<p>Business Interests</p> <p><i>As sole trader:</i></p> <p><i>Partnership interests:</i></p> <p><i>Limited company shares:</i></p>		
<p>Stocks and Shares</p>		
<p>Worldwide Bank/Building Society accounts</p>		

assets and tax (continued...)

Assets	In client's sole name	Joint Name:
<p>National Savings</p> <p><i>Premium Bonds</i></p> <p><i>Certificates</i></p> <p><i>Income Bonds</i></p> <p><i>Other</i></p>		
<p>Life Insurance</p>		
<p>Money lent by you to others and still outstanding</p>		
<p>Interest in Pension Schemes (Including occupational and personal pension schemes)</p>		
<p>Liabilities</p> <p>Credit card debts, loans etc</p>		

assets and tax (continued...)

Gifts and Inheritances

Please give details of gifts made by you within the last seven years in the UK or within the last fifteen years in France, or trusts established by you, or interests in trusts given up by you:

Please give details of any assets gifted by you (either outright or into trust) since 1986 where you either have continued to benefit from the asset or may potentially benefit (e.g. where you are a potential beneficiary of the trust you have established):

Have you received an inheritance (or are due to) in respect of someone who has died within the last two years? Please give details:

Please give details of any trusts of which you are a beneficiary or potential beneficiary:

Do you anticipate that you may receive an inheritance on the death of someone in the future?

Uplift of Inheritance tax free band (by reason of previous death of spouse/civil partner)

If you are or have ever been a widow or widower it may be possible to claim an increased Inheritance Tax free allowance against your estate. If this might be applicable please complete the following schedule in respect of each deceased spouse.

Name of Deceased Spouse	
Address of Deceased Spouse at date of death	
Date of Marriage (Please supply a copy of the Marriage Certificate)	
Date of Death of Deceased Spouse/Civil Partner (Please supply a copy of the Death Certificate)	
National Insurance Number and Tax District	
Please give details of any lifetime gifts the Deceased Spouse made in the seven years preceding the date of death	
Did the Spouse/Civil Partner leave a Will? (If so please provide a copy)	
Was a Grant of Probate/Grant of Letters of Administration obtained? (If so please provide a copy)	
If a Grant of Probate/Grant of Letters of Administration was not obtained, please confirm the value of the estate and provide a copy of the original will	
Please give details of any assets jointly owned by the Spouse/Civil Partner excluding assets which were jointly owned with yourself	
Please give details of any assets held in trust to which the Spouse/Civil Partner was entitled to benefit	
Please give details of any gifts made by the Spouse/Civil Partner where they continued to benefit from the asset after the date of the gift	
Was a Deed of Variation/Family Arrangement completed? (If so please provide a copy)	
Who dealt with the Administration of the Estate (Please provide Name & Address of Solicitors)	
Please supply us with any papers that you may have relating to the estate	

will questionnaire

Name of client

executors

An executor is the person or persons that you appoint in your will to carry out your wishes. Very often husbands and wives may appoint each other and you may wish to appoint your children. An executor may also be a beneficiary. It is advisable to appoint at least two, but no more than four, executors. The administration of an estate is often a time consuming and complex task. If you wish, we can act as your Executors either alone or with a family member or friend. You may also wish to appoint replacement executors in the event that the first executors cannot act.

Please indicate who you would like to appoint as executors:

Full Name of 1 st executor Relationship:	Full Postal Address:
Full Name of 2 nd executor / replacement executor (Please indicate which) Relationship:	Full Postal Address:
Full Name of 3 rd executor / replacement executor (Please indicate which) Relationship:	Full Postal Address:
Full Name of 4 th executor / replacement executor (Please indicate which) Relationship:	Full Postal Address:

Please tick if you would like Ashtons Legal to act as Executor

funeral wishes

You may include any special instructions in the box provided, for example special wishes about your funeral or donation of organs or body to medical science.

Special instructions:

Burial

Cremation

guardians

If you have children who are under 18 years of age, you may appoint guardians to look after them in the event of you and your spouse's/partner's death.

Name of 1st Guardian and relationship:

Full Postal Address:

Name of 2nd Guardian and relationship:

Full Postal Address

legacies

If you are intending to move to France then it is not recommended that any legacies within your Will are left on trust.

personal belongings (including cars, boats etc)

You may specify in detail how you wish these to be dealt with, alternatively you may leave them to be distributed at your executors' discretion in accordance with any informal note of your wishes that you may leave with your will.

Do you wish to leave all your personal belongings to your partner

Y

N

OR

If not, or if your partner does not survive you do you wish your executors to deal with your belongings at their discretion in accordance with your note of wishes

Y

N

OR

Specific Gifts:

legacies of money

Unless otherwise stated, it will be assumed that you want all legacies to be free of tax. If any beneficiaries are under 18 years old (or if older and you do not intend them to receive their legacy immediately after your death) please specify.

legacy of the French property

legacies of other property or assets (not to be included in the general gift of reside)

residue

The residue of your estate is what is left after payment of any debts, taxes and any other gifts. Who would you like to leave this to?

Initial gift of residue:

All to my spouse/partner outright *

* (Although leaving your estate to your partner may seem the obvious choice you may wish to consider placing it in trust to ensure that it ultimately passes to your chosen beneficiaries and to protect against potential costs of your partner needing long term care)

All to be held in trust for my partner's use during his/her lifetime

All to my children in equal shares (with grandchildren taking a parent's share if the parent dies before you)

Other (If more than one specify proportions that beneficiaries take and give names, addresses and relationship to you)

If a child is to inherit a share of your residuary estate, please indicate when you want that child to receive the gift.

On reaching 18

On reaching 21

On reaching 25

Older (please specify)

You may wish to consider placing your estate in trust to protect against situations of a child's bankruptcy, marriage break up or financial problems.

Substituted gift of residue: (if the first gift fails or in the case of a life interest coming to an end)

All to my children in equal shares (with grandchildren taking a parent's share if one of your children dies before you)

Other (If more than one specify proportions that beneficiaries take and give names, addresses and relationship to you)

lasting powers of attorney

A Property and Affairs Lasting Power of Attorney (LPA) is a document where you give someone power to manage your property and affairs on your behalf which is particularly relevant should you become physically or mentally incapable of doing so yourself.

A Personal Welfare Lasting Power of Attorney allows you to choose someone you trust to make decisions about things such as your personal welfare, including whether to give or refuse consent to medical treatment on your behalf and deciding where you live.

Explanatory booklets are available.

Please indicate if this would interest you further

 Y N

additional information

Please use this box to detail any further information that you think appropriate, or which continues from a previous section of this questionnaire.

Ashtons Legal is regulated by the Solicitors Regulation Authority.