

Ashtons Legal office locations

Bury St Edmunds

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

E: enquiries.bury@ashtonslegal.co.uk

T: 01284 762331

Ipswich

Waterfront House
Wherry Quay
Ipswich IP4 1AS

E: enquiries.ipswich@ashtonslegal.co.uk

T: 01473 232425

Norwich

Trafalgar House
Meridian Way
Norwich NR7 0TA

E: enquiries.norwich@ashtonslegal.co.uk

T: 01603 703070

Cambridge

Chequers House
77-81 Newmarket Road
Cambridge CB5 8EU

E: enquiries.cambridge@ashtonslegal.co.uk

T: 01223 363111

Leeds

(Trading as Heslop & Platt)
Suite E14
Joseph's Well
Hanover Walk
Leeds
LS3 1AB

E: contact@heslop-platt.co.uk

T: 0113 393 1930

For further information on how we can help you, please call or email us today:

0800 915 6037

france@ashtonslegal.co.uk

www.ashtonslegal.co.uk/france

Ashtons Legal is authorised and regulated by the Solicitors Regulation Authority (Recognised Body number 45826). The information contained in this guide is of a general nature and specific advice should be sought for specific situations. We believe the information to be correct as at the time of publication, October 2019. While all possible care is taken in the preparation of this leaflet, no responsibility for loss occasioned by any person acting or refraining from acting as a result of the material contained herein can be accepted by the firm or the authors.



French Estate Planning Questionnaire

YOUR DETAILS

First names _____

Surname _____ Maiden/previous name _____

Date of Birth _____ Place of Birth _____

Address _____

Town _____ Postcode _____

Country _____ Tel _____

Mobile _____ E-mail _____

Occupation _____

MARITAL/CIVIL PARTNERSHIP STATUS

Date of Marriage/Civil Partnership _____

Place of Marriage/Civil Partnership _____

If divorced, please confirm date and court where Decree Absolute was granted

If widowed, please confirm date and place of spouse's death

CHILDREN

If you have children please give their details below:

Surname	Forenames	Date of Birth	Place of Birth	Marital Status

If any children are from another relationship, please state name and whose they are on the above form.

Do you have any grandchildren? If yes, please give their details as above.

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

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, so this may therefore need consideration.

Are you planning to move to France on a permanent basis? _____

Where do you consider yourself domiciled? _____

Where do you pay income tax, if at all? _____

THE FRENCH PROPERTY

If you already own property in France, please answer all questions as fully as you can. If you are currently in the process of purchasing a property, please let us have a guide to the estimated value of the property. If you already own your property please forward 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:

• If you are the first partner to die _____

• If you are the second partner to die _____

Do you have any family members you wish to exclude from your French Estate? If yes, please let us have their name and relationship to you.

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.

UK home: _____

Other property: _____

Content: _____

Content: _____

Other capital: _____

Other investments: _____

(value and where held): _____

(value and where held): _____

OTHER MATTERS

Do you already have a French Will? If yes, please let us have a copy and let us know who holds the original.

Do you have a UK Will? If yes, please let us have a copy.

Please note that by purchasing a French Home, it is possible that your UK Will would need to be amended.