

WILL QUESTIONNAIRE

Please fill in the details, save the document and return it by email to the team member who contacted you, or to enquiries@simcocks.com so we can create your Will.

Full Name

Address

Email

Telephone

Date and Place of Birth

Date you moved to Isle of Man (if applicable)

Have you previously made a Will and if so where is it held?

Have you made a Will for foreign property which is not to be revoked by your new Will?

Occupation

Spouse/ Partner Name

When and where were you married?

Or

Is this Will to be made in contemplation of marriage?

Children's Names and Date of Birth:

If the children are under 18 years who is to be their guardian on the death of the survivor of you and your spouse/partner?

Have you been married previously and if so is there any Court Order relating to financial provision?

Are any other persons financially dependent on you?

Name and Address of 1st Executor and state relationship

Executors are the people appointed in your will to carry out your instructions. They bring together all your assets, pay your debts and any gifts of money, transfer any gifts or personal belongings and deal with the remainder in accordance with your will.

Name and Address of 2nd Executor and state relationship

It is advisable to appoint a substitute executor in the event that your first choice is either unable or unwilling to act.

Do you wish to be buried or cremated and where?

Please give address/es of the property you own and approximate value

Do any of your properties have a mortgage?

Approximate cash held in Bank accounts
Please state bank and if joint account

Any Investments

Any Business Interests

Life Assurance – list policies
and amount and to whom
payable on death

Personal Pension details if any
Does any pension pass to
Spouse/partner on death?

Name and addresses of beneficiaries and how they are to benefit:
(if any personal chattels are to be bequeathed these can be stated in the Will or in a separate list)

Do you wish to forgive any loans made to any person?

Do you want any gifts made to your children in your lifetime to be taken into account as part of their share of your estate on death?

Any other facts or matters to take into consideration: