

**THE WILLS REGISTER
CONFIDENTIAL QUESTIONNAIRE**

Questionnaire ID: 520324

Helpline 01303 248644



**THE
WILLS
REGISTER**

Please indicate here if this is to be an individual or two Mirror Wills

Individual/Mirror*

** Delete as appropriate*

Please note that The Wills Register service does not extend to supervising the signing and witnessing of the will. Although any independent adults, who are not benefiting under the Will or married to someone who benefits, may act as witnesses, it is recommended that a will made by an elderly testator should be witnessed by a doctor satisfied that the testator has the required capacity and understanding.

Copyright: South Eastern Estates Ltd, May 2018

The information you provide on this form constitutes the basis of our instruction for drawing up your will.

Please read the questions and accompanying notes carefully before answering.

Please answer in BLOCK CAPITALS. Include FULL NAMES throughout the Questionnaire (i.e. Christian Names and Surnames)

All questions must be answered, (write "NO" "NONE" or "NOT APPLICABLE" if appropriate).

SECTION 1	YOUR PERSONAL DETAILS
(a) Your surname	<input type="text"/>
(b) Your full forenames	<input type="text"/>
(c) Any other name by which you are known	<input type="text"/>
(d) Sex	<input type="text" value="Male/Female*"/>
(e) Your address	<input type="text"/> <div style="text-align: right;">Postcode</div>
(f) Your telephone number	<input type="text"/>
(g) Your date of birth	<input type="text"/>
(h) Your marital status	<input type="text" value="Single, Married, In a civil partnership, Divorced, Widowed*"/>

SECTION 2	DETAILS OF YOUR SPOUSE/PARTNER (write "NOT APPLICABLE" if appropriate)
(a) Surname	<input type="text"/>
(b) Full forenames	<input type="text"/>
(c) Any other name by which known	<input type="text"/>
(d) Sex	<input type="text" value="Male/Female*"/>
(e) Address	<input type="text"/> <div style="text-align: right;">Postcode</div>
(f) Date of birth	<input type="text"/>
(g) Do you expect to marry your partner in the near future?	<input type="text" value="Yes/No/Not applicable*"/>
(h) Do you expect to enter a civil partnership with your partner in the near future?	<input type="text" value="Yes/No/Not applicable*"/>

SECTION 3**DETAILS OF YOUR CHILDREN**

(write "NOT APPLICABLE" if appropriate)

(a) Number of children

(b)

Full names	Address	Date of Birth	**see below

**** For each child please indicate which spouse or partner is parent**

(c)

ILLEGITIMATE AND ADOPTED CHILDREN

Do you wish to exclude illegitimate and adopted children from benefiting under your will?

* Delete as appropriate

SECTION 4**OTHER DEPENDENTS**

(a) Are there any persons other than those mentioned in section 2 and 3 who might consider themselves to be dependent on you?

(b) If yes please provide details

Full names	Address

* Delete as appropriate

SECTION 5**YOUR EXECUTORS**

(a) Do you wish to appoint your spouse/partner as one of your Executors?

Yes/No/Not Applicable*

Please enter full names and address of those you wish to appoint as executors to act jointly with the surviving spouse/partner if applicable.

Name

Address

The Executor Company Yes/No	Postcode
-----------------------------	----------

	Postcode
--	----------

* Delete as appropriate

SUBSTITUTE EXECUTORS

If any of the above die before you or are unable or unwilling to act as your Executors when you die who do you wish to appoint in their place?

The following will only act as executors in substitution and in order of priority.

Name

Address

1ST

The Executor Company Yes/No	Postcode
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2ND

The Executor Company Yes/No	Postcode
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SECTION 6

FUNERAL WISHES

(a) Do you wish to make any funeral directions in your will?

Yes/No*

IF YES

(b) Do you wish

- a. To be buried
or
- b. To be cremated
or
- c. To donate your body for the treatment of others and for medical education or research

Tick box*

* Delete or Tick as appropriate

SECTION 7

GUARDIANS OF MINOR CHILDREN

Please read notes the relating to guardians carefully before completing this section.

Do you wish to appoint guardians for your children?

Yes/No/Not applicable*

Full names of Guardians

Address

	Postcode
--	----------

AND

	Postcode
--	----------

* Delete as appropriate

SECTION 8

SPECIFIC LEGACIES

(a) Do you wish to give any specific legacies?

Yes/No

IF NO TURN TO SECTION 9

IF YES

(b) Do you wish these to take effect only if your spouse/partner does not survive you? i.e. only after the 2nd death.

Yes/No/Not applicable*

(c) **Full Description of Item being given Name and Address of Beneficiary**

(i)		
(ii)		
(iii)		
(iv)		
(v)		
(vi)		
(vii)		

* Delete as appropriate

SECTION 9

CASH LEGACIES

(a) Do you wish to give any cash legacies?

Yes/No*

IF NO TURN TO SECTION 10

IF YES

(b) Do you wish these to take effect only if your spouse/partner does not survive you? i.e. only after the 2nd death.

Yes/No/Not applicable*

(c) **Amount in Words** **Name and Address of Beneficiary**

(i)		
(ii)		
(iii)		
(iv)		
(v)		
(vi)		
(vii)		

* Delete as appropriate

SECTION 10(A)

GIFT OF RESIDUARY ESTATE

(a) Do you wish to leave all your Residuary Estate to your spouse/partner?

Yes/No/Not applicable*

IF NO/NOT APPLICABLE TURN TO SECTION 10(B)

IF YES

(b) If your spouse/partner dies before you, do you want your Residuary Estate to go to all your children, in equal shares, including those born in the future?

Yes/No/Not applicable*

IF NO/NOT APPLICABLE TURN TO SECTION 10(C)

IF YES

(c) If your spouse/partner has children from a previous relationship do you want these to benefit to the same extent as your own children?

Yes/No/Not applicable*

IMPORTANT PLEASE ANSWER NOT APPLICABLE IF NEITHER SPOUSE HAS CHILDREN FROM A FORMER RELATIONSHIP

IF NO/NOT APPLICABLE TURN TO SECTION 11

IF YES

Which spouse/partner has children from a former relationship?

TURN TO SECTION 11

* Delete as appropriate

SECTION 10(B)

GIFT OF RESIDUARY ESTATE cont...

(a) Do you want to leave your Residuary Estate to all your children (including those born in the future) in equal shares?

Yes/No/Not applicable*

IF NO/NOT APPLICABLE TURN TO SECTION 10(C)

IF YES

(b) If your spouse/partner has children from a previous relationship, do you want these to benefit to the same extent as your own children?

Yes/No/Not applicable*

IMPORTANT PLEASE ANSWER NOT APPLICABLE IF NEITHER SPOUSE HAS CHILDREN FROM A FORMER RELATIONSHIP

IF NO/NOT APPLICABLE TURN TO SECTION 11

IF YES

Which spouse/partner has children from a former relationship?

* Delete as appropriate

SECTION 10(C)

GIFT OF RESIDUARY ESTATE cont...

Do you want to leave your Residuary Estate to all members of a single category of relatives in equal shares?

Yes/No*

IF NO TURN TO SECTION 10(D)

If yes please indicate which category Tick **ONE** box

Your brothers and sisters

Your parents

Your nephews and nieces

Your first cousins

Your uncles and aunts

N.B. This section is only applicable if this questionnaire is being used for a Single Will.

If for Mirror Wills fill in details in 10(D)

* Delete as appropriate

SECTION 10(D)

Please specify persons/charities to benefit

	Name	Address	Share**
(i)			
(ii)			
(ii)			
(iv)			
(v)			

** Share must be expressed as a fraction and totalled to equal 1.
You have now completed this section of the questionnaire. Please turn to section 11.

SECTION 11**THE ULTIMATE GIFT OVER CLAUSE**

You may wish to make provision to deal with the possibility of *none* of the beneficiaries whom you have previously specified surviving you. In this section you should set out the name of the charity or individuals who should benefit in this event.

If you do not wish to make any such provision please write 'None' in the space provided.

SECTION 11**THE ULTIMATE GIFT OVER CLAUSE**

In the event of none of the persons you have specified in Section 10 surviving you, you wish your Residuary Estate to go to:

	Name	Address	Share**
(i)			
(ii)			
(ii)			
(iv)			
(v)			

** Share must be expressed as a fraction and totalled to equal 1.

THE WILLS REGISTER AGREEMENT

1. I/we understand that the Wills Register will draft my/our last Will & Testament solely from the information I/we have supplied in this questionnaire.
2. I/we have received a copy of and accept the Wills Register Group Privacy Policy
3. I/we have personally completed this questionnaire and confirm that it is an accurate record of my/our testamentary wishes.
- 4. I/we have read the notes accompanying this questionnaire.**
5. I/we enclose my/our payment in the sum of in respect of the drafting fee.

Signed	Date
--------	------

Signed	Date
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THE QUESTIONNAIRE REMAINS THE PROPERTY OF THE WILLS REGISTER
THE WILLS REGISTER is a trading name of South Eastern Estates Ltd. P.O. Box 331,
Folkestone Kent CT20 2GH
Registration Number 1917371. Established 1985.

WHERE TO STORE YOUR WILL

By taking advantage of the unique ‘Will Care Lifelong Service’ you not only enjoy all the benefits of the Will Safe Storage facility, but you will also have the ability to re-write your Will at any time in the future free of charge.*

If you are single and subsequently marry, your new Will and your spouse’s Will is free of charge.

The Will Care Lifelong service should be a serious consideration for all. You can only see so far ahead when making a Will and circumstances do change.

For single or mirror Wills the cost of the Will Care Lifelong Service is only £22.95 per annum.

Simply complete the standing order mandate and return it with your completed Will questionnaire.

* (A small service charge may be levied if more than once every two years)

STANDING ORDER MANDATE

TO THE MANAGER:**BANK PLC**

.....

.....**POSTCODE:**

Please make the payments detailed below and debit my/our account until further notice in writing

NAME OF ACCOUNT TO BE DEBITED:

ACCOUNT NO: _____ **DATE:**20.....

SORT CODE: ____ -- --- ____ -- --- ____

SIGNATURES:

ON THE: **AN ANNUAL PAYMENT OF £22.95 (twenty two pounds 95)**

FIRST PAYMENT TO BE MADE ON:

PLEASE PAY BARCLAYS BANK PLC, 93 LEWISHAM HIGH ST, LONDON SE13 6BB. Sorting Code 20-49-81

FOR THE CREDIT OF THE EXECUTOR COMPANY LTD. Account No. 30449822

QUOTING THE FOLLOWING REFERENCE

THE WILLS REGISTER

P.O. Box 331

Folkestone

Kent

CT20 2GH

THE WILLS REGISTER PRIVACY POLICY

Protecting your personal information is extremely important to The Wills Register. This is a copy of our privacy policy which sets out how we use and protect your personal information. This will take effect during May 2018 and may be subject to change in the future. You can find the most recent version of this policy on willsregister.co.uk

If you have any specific concerns around the privacy of your personal data or require further information about how we manage your personal information, please contact us directly:

By Post: The Wills Register, PO Box 331, Folkestone, Kent, CT20 2GH

By Phone: 01303 248644

By email: service@willsregister.co.uk

Your Data Protection Statement

Introduction

Your personal data is data which by itself or with other data available to us can be used to identify you.

Where there are two or more people named, this data protection statement applies to each person separately.

The types of personal data we collect and use

1. Full name and personal details including contact information (e.g. home address, email address, home/mobile telephone numbers).
2. Date of birth, gender, marital status, visual impairment, mental capacity and understanding of written English.
3. Full name and address and date of birth of any children, grandchildren, step children and step grandchildren.
4. Your testamentary wishes (e.g. details of your chosen executors, guardians of your minor children, your funeral wishes, bequests and beneficiaries and division and beneficiaries of your residuary estate).
5. Any other data deemed necessary to perform our contract (e.g. any other financial dependents, details of any mortgage, any life insurance, foreign property, any foreign wills and details of any holdings in private businesses).
6. Your bank details to establish a standing order or direct debit for the charge if you choose to use our will safe facility to store your original will document or for transferring a legacy when acting in the administration of an estate.
7. Hard copy ID evidence such as passport/drivers licence/utility bill for ID in releasing a will to an executor or ID of a beneficiary when acting in the administration of an estate.

Using your personal data: the legal basis and purposes

We will process your personal data:

1. As necessary to perform our contract with you for the relevant service:
 - a) To take steps at your request before entering into it;
 - b) To decide whether to enter into it;
 - c) To manage and perform that contract;
 - d) To update our records.
2. Special category (sensitive) data: Where you have consented, we will process any medical & health and any other sensitive information solely for the purpose of drafting your will (e.g. a blind person will need a special attestation clause inserted in their will).
3. Based on your consent: (e.g. you are an executor applying for the release of an original will).
4. As necessary for our own legitimate interests.

Sharing your personal data

Subject to the applicable data protection laws we may share your data with:

1. The Wills Register Group of companies.
2. Subcontractors and other persons that help us provide our services.
3. Companies and other persons providing services to us.
4. Our legal and other professional advisors.
5. Companies, your financial adviser and other persons who may have assisted you in providing us with your personal data (e.g. while taking your will instructions).
6. The Court of Protection or other bodies or persons as necessary in the event of your lost capacity.
7. In defending any claim against us.
8. Your Executor(s) and their Attorney(s) and all Courts, government departments, bodies, companies and persons necessary after your death and in the administration of your estate.
9. When we restructure or sell our business or its assets or have a merger or re-organisation.

Criteria used to determine retention periods (whether or not you become a customer)

The following criteria are used to determine data retention periods for your personal data.

1. Retention in case of queries. We will retain your personal data as long as necessary to deal with your queries (e.g. if we decline your request to draft your will for any reason).
2. We will keep your personal information in accordance with our internal retention policies. We will determine the length of time we keep it for based on the minimum retention periods required by law, regulation or will writing industry procedures. We will only keep your personal information after this period if there is a legitimate and provable business reason to do so.

The GDPR provides the following rights for individuals:

Your rights are as follows noting that these rights don't apply in all circumstances.

1. The right to be informed about our processing of your personal data.
2. The right to request access to your personal data and information about how we process it.
3. The right to rectification if your personal data is inaccurate or incomplete.
4. The right to have your personal data erased.
5. The right to restrict processing of your personal data.
6. The right to data portability, move, copy or transfer your personal data.
7. The right to object to processing of your personal data.
8. Rights in relation to automated decision making and profiling.
- 9.

Transferring your data outside the EU

The data that we collect from you may be transferred to, and stored at, a destination outside the European Economic Area ("EEA") to third-party suppliers, delegates or agents. We'll take all reasonably necessary steps to make sure that your data is treated securely and in accordance with this privacy policy.

We'll only transfer your data to a recipient outside the EEA where we're permitted to do so by law (for instance, (A) where the transfer is based on standard data protection clauses adopted or approved by the European Commission, (B) where the transfer is to a territory that is deemed adequate by the European Commission, or (C) where the recipient is subject to an approved certification mechanism and the personal information is subject to appropriate safeguards, etc.).

Unfortunately, sending information via e-mail is not completely secure; anything you send is done so at your own risk. Once received, we will secure your information in accordance with our security procedures and controls.

You may request that we send a printed copy of your will to a destination outside the EEA. This will be sent by normal post at your own risk.

Security

We take all reasonable precautions to keep your personal information secure, including safeguards against unauthorised access, use or data loss. Unfortunately, sending information electronically or by post is not completely secure. Any of your personal data sent electronically or by post to or from us is sent at your own risk.

Making a data protection complaint

If you have any questions about this privacy policy or wish to exercise any of your rights, including changing your marketing preferences, please get in touch with us using the contact details above.

If you have any concerns about the way we process your personal data, or are not happy with the way we've handled a request by you in relation to your rights, you also have the right to make a complaint to the Information Commissioner's Office. Their address is:

First Contact Team
Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
SK9 5AF