



MACNABS
YOUR PARTNERS IN LAW

WILLS QUESTIONNAIRE

Please complete
as much of the
information as
possible ahead of
your appointment



CALL US: 01738 623432



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PERTH | PITLOCHRY | BLAIRGOWRIE | BRIDGE OF ALLAN

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Your name and address:

Your spouse (if applicable):

1

ASSETS - Please provide a brief summary of your assets and approximate value (properties, foreign assets, company interests, high value items such as paintings or jewellery etc). This will help us advise you on Inheritance Tax and asset protection.

2

DEBTS - Please provide details of any loans and debts including approximate value, e.g. mortgage.

3

EXECUTOR - Who is to be your executor? This is the person(s) appointed to administer your estate in accordance with the Will. It is advisable to consider having more than one Executor, either as a joint appointment or with a substitute, and he/she should be over 18 years of age. Macnabs Trustees Ltd can be appointed as an Executor if you wish.

4

ESTATE - Who would you like to inherit your estate and in what proportions (e.g. all to spouse who failing equally among children)?

5

LEGACIES - Are there any specific items or cash sums you would like to leave to particular persons or organisations / charities?

6

If the beneficiaries, named above, were to die before you, would you want their own children (if any) to inherit on their behalf, or would you prefer their entitlement to pass proportionately to the other named beneficiaries?

7

FUNERAL - Do you wish any funeral instructions noted (e.g. cremation / burial)?

8

HOUSE TITLE DEEDS - If applicable, where are your house title deeds stored? We would be happy to store them in the firm's safe alongside your signed Will for completeness should you wish.