

WILL WRITING SERVICE QUESTIONNAIRE

To instruct your Will please complete the following questionnaire, for a Mirror Will (i.e. a Will by a spouse or partner containing reciprocal or similar conditions), each party must complete a separate form and return to the above or post to:-

Messrs W. & A.S. BRUCE SOLICITORS, 15-17 CHALMERS STREET, DUNFERMLINE, FIFE KY12 8AT

If you have any queries with regard to making your Will please ring.

W. & A.S. BRUCE HELPLINE 01383 738000

or write to W. & A.S. Bruce at the above address. Some additional advice about making a Will is available free of charge. After returning this questionnaire please allow up to 28 days for the draft Will to be prepared.

Section A

1	Your Surname
	First Name
	Other Names
	Occupation
	Date of Birth
<p style="text-align: right;">Are You:</p> <p>Is Scotland your permanent home and do you consider your domicile to be in Scotland and you wish the succession of your estate to be determined by the Law of Scotland</p> <p> <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Second Marriage </p> <p> <input type="checkbox"/> YES <input type="checkbox"/> NO If no please telephone the helpline for advice. </p>	
2	Your Address
	House name or number
	Street
	Town
	County
	Postcode
3	Work telephone number (inc. area code)
	Home telephone number

Section B

This section applies to married people or partners living together (if you have children refer also to Question 7) - If you have no partner or children refer next to Question 17.

NOTE 1: If you have a spouse, children or grandchildren from a predeceasing child they may have a claim against your estate (legal rights) notwithstanding the terms of your Will. These possible claims can be explained in detail, if required. Please ring the W & A S Bruce Helpline.

4	Is your husband/wife/partner to inherit everything or the residue of your estate? (Legacies or bequests of cash or specific items should be detailed in Question 8. Please refer to Note 1). YES <input type="checkbox"/> NO <input type="checkbox"/>	
	5	a) If yes give the full name of your husband, wife, partner and their date of birth. (Your Spouse or Partner will normally be appointed Executor if they are to inherit your estate unless the contrary is stated.)
		b) If no, what is your husband/wife/partner to inherit?
	What do you wish to do with the remainder or residue of your estate?	

9 Do you wish to give a sum of money or an item of value to a particular Charity? If so, please give: -
Please also indicate if this is conditional or is to be paid in the event of a spouse or nominated beneficiary predeceasing you.

Full name of Charity	
Address (if known)	
<i>(Use separate sheet if necessary)</i>	

NOTE 4: If no age is specified children will be entitled to payment at age 16 which is the age of Legal Capacity in Scotland.

10 Are your children to inherit everything else in equal shares YES NO

Are they to inherit at age 18 or 21 or some other age? Please specify age - (See Note 4).

11 If not equal shares, how is their inheritance to be divided?
Please specify the shares here.

12 Please give the full names and addresses (including married names) of all your children.

13 If your children die before you leaving children of their own, i.e. your grand-children, are they to inherit the share your son/daughter would have inherited if they had survived?
YES NO

14 We would advise that your Executors should be given the right to invest any money where they think best whilst your children are under age or waiting to inherit their share. Otherwise the Law decides where they can invest. Do you agree?
YES NO

15 We advise that you should give your Executors the right to use money for the maintenance benefit and education of any child that is to inherit. Do you agree? YES NO

16 If this is your second marriage and you and your husband/wife have children to their first marriage and there are now also children of you both then you should consider their position very carefully. Please ring W & A S Bruce to discuss the options open to you.

Section C

This section applies to single people or those without children only.

17 You should name two Executors to carry out the instructions in your Will. These can be friends or relatives. The partners of W & A S Bruce Solicitors can be named as both of these Executors, or you can name them as well as your friend or relative to give them much needed support. (See Note 2).

Do you wish W & A S Bruce Solicitors	YES <input type="checkbox"/> NO <input type="checkbox"/>
If no, then please give full names and addresses of two Executors:	
EXECUTOR 1.	EXECUTOR 2.
<i>(relationship to you, if any)</i>	<i>(relationship to you, if any)</i>

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Do you wish to give a sum of money or any particular items e.g. jewellery, furniture or the like to any person? If so, then please specify the amount of money or give a detailed description of the item (e.g. my three-stoned diamond ring) and the full names (and relationship to you, if any) of the person to receive it (e.g. my friend Mary Jones; my Uncle Joe Smith) use a separate sheet if necessary.

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Do you wish to give a sum of money or an item of value to a particular Charity? If so, please give:

Full name of Charity

Address (if known)

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If friends and/or relatives are to inherit the bulk of your Estate then please give:

a) Their full names and addresses, and relationship to you if any, and the share they are to inherit.

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Please consider what is to happen if one or more of them should die before you do, i.e. are the ones who survive to inherit this share as well as their own or is someone else to benefit?

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There may be other things you wish to do which this guide does not provide for. If so, write these here or ring us to discuss them. If you own heritable property/real estate outwith Scotland and you should consult a Solicitor in the jurisdiction of the property for advice regarding succession to such property.

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Signed..... Date.....

Return to: Messrs W & A S Bruce, 15-17 Chalmers Street, Dunfermline, Fife.
Telephone: 01383 738000

When you have completed the questionnaire, please return it to W & A S Bruce Solicitors. Thank you. PLEASE ALLOW 28 DAYS FOR THE WILL TO BE PREPARED.

Note: *If for any reason you have not heard from W & A S Bruce within that 28 day period, please telephone to enquire.*

If you need more space for your answers please use a separate piece of paper and return it with the questionnaire.