

Will questionnaire

FOR PERSONS DOMICILED AND RESIDENT IN JERSEY

General

Please note that there is a distinction in Jersey Law between real or immovable property on the one hand and personal or movable property on the other. The law and rules governing these are different and this questionnaire therefore deals with them separately.

1. Full name, including maiden name and any previous name (if applicable):
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2. Marital Status:
3. Current address:
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4. Telephone numbers: Home..... Mobile
5. Email:
6. How did you acquire your domicile in Jersey?
 - (i) Were you born in the Island? YES/NO
 - (ii) Have you acquired a domicile of choice in the Island? YES/NO
If so when?
7. Do you have any existing wills dealing with your assets in Jersey or elsewhere? YES/NO.
If yes, please provide copies.
8. If you have existing wills, are they to be revoked in so far as they deal with the assets to be included in your Jersey Will? YES/NO

9. Full name and title of spouse/civil partner (including maiden name):

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10. Children – Full names (including maiden names) and dates of birth (if under 18) of your children and their addresses, if different from your own:

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Personal or Movable Estate

(which includes share transfer property)

11. Is your Jersey will to be limited to personal or movable assets in Jersey or, is it intended to cover all your personal or movable assets wherever situate?

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12. What types of assets situate in Jersey or elsewhere are to be included in your Jersey will (e.g. bank account, cash, securities, life insurance policies, jewellery, household contents and effects)?

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How are these held (by a nominee or in your own name or in joint names)?

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13. Do you hold any digital assets (e.g. online bank accounts, Paypal etc?) If yes, please provide details:

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14. Full name(s) and address(es) of executor(s):

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The executor will be responsible for obtaining Probate of your Will, collecting in your estate, settling any liabilities and distributing your net estate in accordance with the terms of your Will.

Please note that the executor will have to attend personally in Jersey before the Probate Registrar to obtain the Grant of Probate or appoint an attorney to do this on his or her behalf. Le Gallais & Luce can provide the services of an executor if you so wish.

15. Do you have any special wishes regarding cremation, burial, funeral etc?

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16. Should you and/or your spouse die leaving children aged under 18, do you wish to appoint a guardian? If yes, please provide details below:

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17. Are there any specific bequests you wish to make? (e.g., cash gifts, jewellery etc). If so please give details of the specific item(s) and of the intended beneficiary(ies).

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18. Who are your proposed beneficiaries to the rest and residue of your personal estate (apart from those detailed in 17 above)?

Please provide their full names and addresses and the share which they are to receive.

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19. In the event that any or all of the persons mentioned in 18 above fail to survive you, who would you wish to benefit in their place?

Please provide their full names and addresses and the share they are to receive in those circumstances.

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Real or Immovable Estate situate in Jersey

(which does NOT include share transfer property which forms part of your personal estate)

20. Do you own any Jersey real or immovable property?

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21. If the answer to 20 is yes, is such property owned solely by you or jointly with your spouse or other person?

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22. Please give details of such property or properties.

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23. Who are your proposed beneficiaries?

Please provide their full names and addresses and the shares which they are to receive.

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24. In the event that any or all of the persons mentioned in 23 fail to survive you, who would you wish to benefit in their place?

Please provide their full names and addresses and the shares which they are to receive in those circumstances.

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NB Jersey Law does not permit either executors of Jersey real estate or trusts of Jersey real estate. For example, you cannot direct that upon your death your immovable property be sold and the proceeds of sale divided in a certain way.

Do you own any real estate situate outside Jersey?

If so, please provide details of such property or properties:

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This must be dealt with in accordance with the law of the country where the real estate is situate to ensure that the Will complies with such law.

Signed

Dated: