

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 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 addresses. Please also provide their dates of birth if under 18.

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Personal or movable estate (which includes share transfer property)

11. Is your will to be limited to personal or movable assets in Jersey only, or for example, personal or movable assets wherever situate, i.e. worldwide assets?

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12. What types of assets situate in Jersey or elsewhere are to be included in your 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. Revolut, 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? For example, if you wish to be cremated, please give details of where you wish your ashes to be scattered or interred, or if you wish to be buried, do you have a burial plot where you want to be buried?

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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 their full names and addresses.

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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), including their full names, addresses and relationship to you (if any) e.g. mother/father/sister/brother etc

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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. Please also confirm their relationship to you (if any) e.g. mother/father/sister/brother etc

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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. Please also confirm their relationship to you (if any) e.g. mother/father/sister/brother etc

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Real or immovable estate in Jersey

(which does NOT include share transfer property which forms part of your personal or movable 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. Please also confirm their relationship to you (if any) e.g. mother/father/sister/brother etc

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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. Please also confirm their relationship to you (if any) e.g. mother/father/sister/brother etc

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

Do you own any real or immovable estate situate outside Jersey?

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

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

☐ Please tick to acknowledge and accept our Terms of Business

Signed

Dated