

Will questionnaire

FOR NON-JERSEY RESIDENT

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. Country of domicile:
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

Personal or movable estate

9. Is your Will to be limited to personal or movable assets in Jersey? YES/NO If no, please provide details.
10. What types of assets situate in Jersey or elsewhere are to be included in your will (e.g. bank account, cash, securities)? How are these held (by a nominee or in your own name or in joint names)?
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11. Full name and title of spouse/civil partner (including maiden name):

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12. Children – Full names (including maiden names) and addresses. Please also provide their dates of birth if under 18:

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13. 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.

14. 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 the intended beneficiary(ies), including full names, addresses and relationship to you (if any), e.g. mother/father/sister/brother etc..

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15. Who are your proposed beneficiaries to the rest and residue of your personal or movable estate? Please provide their full names and addresses and the share which they are to receive. Please include their relationship to you (if any), e.g. mother/father/sister/brother etc.

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16. In the event that any or all of the persons mentioned in 15 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 include their relationship to you (if any) e.g. mother/father/sister/brother etc.

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Real or immovable estate situate in Jersey

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

17. Do you own any Jersey real or immovable property?
18. Is your Jersey real or immovable property owned solely by you or jointly with your spouse or other person?

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19. Please give details of your Jersey real or immovable estate.

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20. Who are your proposed beneficiaries?

Please provide their full names and addresses and the shares which they are to receive. Please include their relationship to you (if any), e.g. mother/father/sister/brother etc.

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21. In the event that any or all of the persons mentioned in 20 above fail to survive you, who would you wish to benefit in their place?

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

Please tick to acknowledge and accept our Terms of Business

Signed

Dated: