

PLEASE COMPLETE AND RETURN THIS WILL QUESTIONNAIRE TO VIBERTS' PRIVATE CLIENT DEPARTMENT:
Post: Private Client Department, Viberts House, Don Street, St. Helier, Jersey JE4 8ZQ Email: privateclient@viberts.com
Should you wish to speak to someone for help completing this form please call 01534 632263.

Section 1: Your Personal Information

Full name and title (Mr, Mrs, Miss, Ms, Dr, etc.) including maiden name and any previous names (if applicable):

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Date of birth: Relationship status:

Please provide full name and title (Mr, Mrs, Miss, Ms, Dr, etc.) of spouse/civil partner/partner (including maiden name):

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Full postal address:

..... Postcode:

Telephone numbers: Home: Work: Mobile:

Email:

Are you an existing Viberts' client? Yes: No: If not, how did you hear about us?

Do you have any existing wills? Yes: No: If yes, please provide copies.

Where are the original will(s) stored?

Were you previously married or in a civil partnership? Yes: No:

If yes, do you have a decree absolute or a decree of dissolution of your partnership? Yes: No:

If yes, please provide full name and title (Mr, Mrs, Miss, Ms, Dr, etc.) of your former spouse/civil partner (including maiden name):

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Do you have a matrimonial agreement or an order of the court? Yes: No: (If yes, please provide a copy).

Children (if applicable) - Full names (including maiden name) of your children and addresses if different from your own.

Child 1:

Child 2:

Child 3:

Child 4:

Stepchildren (if applicable) - Full names (including maiden name) of your stepchildren and addresses if different from your own.

Stepchild 1:

Stepchild 2:

Stepchild 3:

Stepchild 4:

Have you ever adopted a child or given up a child for adoption? Yes: No: (If yes, please provide details below)

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Do you have any other dependants who are financially dependant upon you? Yes: No: (If yes, please provide details below)

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Section 2: Your Capacity

To ensure that a will is valid and to avoid challenges to the Will by reason of lack of mental capacity, it is necessary to establish if you have been diagnosed with any medical impairment which may affect your judgement at the time of making this will.

Do you suffer from a mental impairment i.e. dementia, alzheimers or other?

Yes: No: If yes, please provide details:

Note: If you have been diagnosed with an illness that may affect your mental capacity, you may wish to consider obtaining a letter from your G.P. confirming your capacity to make a will. This will help protect your will from challenge.

Section 3: Your (Immovable) Property

Immovable property includes freehold land or buildings, flying freehold, leases over 9 years and certain types of mortgages.

Share-Transfer property in Jersey is treated as movable property. If you own a Share-Transfer property, please complete Section 5: Your Personal (Movable) Estate.

Immovable property is governed by the law of the jurisdiction in which it is situated. As such, if you own immovable estate in a jurisdiction other than Jersey you must take advice from a lawyer in that jurisdiction. Most, but not all, EU states allow the holders of British passports issued in Jersey to subject their immovable property located within their borders to Jersey's inheritance laws. If that option is of interest to you we would be happy to guide you through the steps to be followed.

Address of property in Jersey:

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Approximate current value: £

Is it flying freehold, freehold or a lease over 9 years?

Do you own this property solely or jointly with another? Solely: Jointly:

If jointly, is that as tenants in common or jointly for the survivor?

Are there any charges registered on the property such as a mortgage or loan? Yes: No:

If yes, please provide lenders details below and the value of the loan outstanding at time of making will:

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If there are charges registered on the property, is there a life policy assigned to the lender to cover the borrowing in the event of your death? Yes: No: If yes, please provide name of insurer:

Do you own immovable property in any other jurisdiction? Yes: No: If yes, please provide details below:

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Section 4: Disposal of your Immovable Estate

Do you want to leave your entire Immovable estate to your spouse/partner or civil partner in the first instance? Yes: No:

If not, to whom do you wish to leave your Jersey immovable property?

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If you wish to leave it to more than one person, please state the shares in which they are to inherit.

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Please note that you cannot create a trust of immovable property in Jersey (for example you cannot direct that upon your death your immovable property be sold and the proceeds of sale divided in a certain way).

If the person(s) named above die before you, to whom do you wish to leave the share that person would have inherited had they survived you?

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N.B. If you are making a will at the same time as your spouse/partner or civil partner you may wish to consider having mirror provisions in this section to ensure that both your wishes are carried out, failing which, upon your death your assets may devolve to your spouse/ partner or civil partner's family rather than equally between each of your families.

Section 5: Your Personal (Movable) Estate

Movable estate covers everything not included under immovable estate (share transfer property, cash, life insurance, investments, shares, motor vehicles, jewellery, household contents and digital assets).

If you wish to leave any particular items to named individuals you must ensure that the item is fully described, so that it can be easily identified upon your death.

Your debts are paid out of your movable estate before distributions are made.

Your movable estate, (unlike immovable estate), is governed by the law of your place of domicile.

If you were born in Jersey and intend to reside in Jersey for the remainder of your days then it is likely you are domiciled in Jersey.

If you were not born in Jersey, but are resident in Jersey and intend to remain here for the rest of your days, then you may have acquired a domicile of choice in Jersey. We will be pleased to discuss these issues with you.

Where are you domiciled?

The executor carries out the instructions in your will of movable estate. They apply for a Grant of Probate (permission of the court to carry out the terms of your will). A beneficiary may be an executor, as can a spouse.

You may wish to appoint an alternate executor should the executor you appoint predecease you. In the event that you do not wish for a family member or a friend to be your executor, our in-house executor company, Viberts Executors Limited, offers cost effective executorship services.

Executor/s name/s and addresses:

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Would you like to appoint Viberts Executor Limited to act as your executor? Yes: No:

Would you like to appoint Viberts Executor Limited to act as alternate executor? Yes: No:

Your current assets

What is the total value of funds in all your bank accounts? £

Are these bank accounts held jointly with another? Yes: No: If yes, please give details below:

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Do you have investments? Yes: No: If yes, what is total value of your investments? £

Are these investments held jointly with another? Yes: No: If yes, please provide details below:

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Do you own share transfer property? Yes: No: If yes, what is the total value of the property? £

Is this property held jointly with another? Yes: No: If yes, please provide details below and Articles of Association:

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Do you have a life insurance policy? Yes: No: If yes, what is the value of the policy? £

Is this asset held jointly with another? Yes: No: If yes, please provide details below:

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Does this policy have a letter of wishes attached to it? Yes: No: If yes, please provide details below:

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Do you have assets held outside Jersey? Yes: No: If yes, what is the total value? £

Is this asset held jointly with another? Yes: No: If yes, please provide details below:

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Are your house contents owned jointly? Yes: No: If no, please provide details:

..... What is the approximate total value of the contents? £

Your digital assets

Do you hold any digital assets (e.g. online currency such as Bitcoin, or payment services as Paypal)? Yes: No:

If yes, please provide details:
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What is the total value of your digital assets? £

Are these digital assets held jointly with another? Yes: No: If yes, please provide details below:

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Section 6: Life Time Gifts

Have you made any substantial gifts/transfers of assets to either your spouse or children? Yes: No:
 This would include the transfer of funds from your sole name into joint names.

Section 7: Instructions for Movable Estate

Do you want to leave your entire Movable estate to your spouse/partner/civil partner in the first instance? Yes: No:

Your Pecuniary legacies (cash gifts)

If you have a spouse/partner/civil partner to whom you are leaving the residue of your Estate, do you wish this gift to be effective only if your spouse/partner/civil partner dies before you? Yes: No:

To whom do you wish to leave the residue of your assets (the remainder after payment of debts and any pecuniary legacies or specific bequest provided for)? If to more than one individual, please state in what shares.

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N.B. Please confirm if this individual is related to you and what relation they are:

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If the person(s) named above dies before you, to whom do you wish to leave the residue of your movable estate and in what shares?

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Would you like to make a gift to charity? Yes: No: (If yes, please state below which charity. More information can be found on The Association of Jersey Charities website: www.jerseycharities.org.)

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Section 8: Children & Guardians

Should you and your spouse/partner or civil partner die leaving children aged under 18, do you wish to appoint a guardian?

Yes: No:

If yes, please provide details below: (please note that under Jersey law you can only appoint one guardian. You may however appoint an alternative guardian should your first guardian die before you or be unable to act.)

1st Guardian:

2nd Guardian:

Section 9: Your Funeral

Funeral instructions (not compulsory e.g. prepaid plan, specific location, etc.)?

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Would you prefer to be buried / cremated or other?

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