



## Wills questionnaire

Insights - 05/05/2023

Making a will is an important step in planning for the future, providing reassurance that your wishes will be carried out correctly.

Ogier's online wills portal allows you to begin the process, in a cost and time efficient manner, at your own pace. The process involves submitting an online questionnaire for review before arranging a face-to-face meeting to review and finalise your will.

Before the meeting is arranged, a member of Ogier's expert team will use the information provided in the form to estimate the total cost for Ogier to draft your will. No charge will be incurred for completing the questionnaire.

### Online questionnaire: quick and easy submission

Start making your Jersey will online using Ogier's wills portal.

The questionnaire guides you through a series of steps, with instructions and explanatory notes for easy reference.

### PDF questionnaire: download, complete, and return

To complete this questionnaire, download your own PDF version.

If you require any further information, please do not hesitate to contact us.

### The questionnaire

Personal details

Your full name	
Maiden or former names	
Current address	
Date of birth	
Marital status (please specify)	<p>Single</p> <p>Married</p> <p>In a civil partnership</p>
Have you been previously married or in a civil partnership?	<p>Yes</p> <p>No</p>
If yes, when was this dissolved?	
Telephone number	<p>Home:</p> <p>Mobile:</p>
E-mail address	
Domicile (your permanent home) - Are you domiciled in Jersey?	
Were you born in Jersey?	<p>Yes</p> <p>No</p>

Your full name	
If no, have you acquired a domicile of choice here?	Yes No If yes, from what date?

## Existing wills

Do you have any existing wills?	Yes No
If yes, where are the held? (We will need either the originals of these or copies - contact us to discuss further)	

## Your family

Full name of (including maiden name) of spouse/civil partner	
Address of spouse/partner	
Full names of children and their dates of birth	
Addresses of children (if different from your own)	
Full name and address of any other dependents such as step-children	

## Your capacity

In order to make a valid will and to reduce the chance of your will or wills being challenged on the grounds of lack of mental capacity, it is important that you let us know whether you have ever suffered from, or been diagnosed with, a medical condition that might impact your capacity.

If so, we may need to obtain a letter from your GP confirming your capacity to make a will or ask your GP to act as one of the witnesses to your will.

Do you suffer from a medical condition that might affect your ability to make a valid will?	
If yes, provide further details and the name of your GP	

## Your estate

There is a distinction in Jersey Law between real or immovable property (such as freehold land or buildings) on the one hand and personal or movable property (such as cash, shares and personal possessions) on the other. The law and rules governing these two categories of property are different and this questionnaire therefore deals with them separately. It is likely that if you own both types of property, you will need two separate wills to be drafted.

*Note that share transfer property in Jersey is treated as a moveable asset rather than an immovable asset.*

If you own immovable property in a country other than Jersey, you may need to take separate advice from a lawyer located in the jurisdiction that the property is located in. However, since 2015, most EU states now allow Jersey residents to elect for Jersey law to apply to the succession of their foreign immovable property. *Speak to your legal advisor for more information.*

## Your immovable (real) estate (for example, freehold property in Jersey)

**Property details** (Complete this part if you own immovable estate in Jersey).

Property name and address	Approximate value	Is property owned jointly or solely  <i>If jointly, is this as joint tenants (and for the survivor) or as tenants in common?</i>


Do you own property outside of Jersey? *(If yes, provide details below).*

Property name and address	Approximate value	Is property owned jointly or solely?  If jointly, is this as joint tenants (and for the survivor) or as tenants in common?

### Beneficiaries

Who are the intended initial beneficiaries of your immovable estate?

Beneficiary name	Relation	Address	Age	Name of property and percentage to inherit

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In the event that the person/s named above do not survive you, who would you wish to benefit in their place?

Beneficiary name	Relation	Address	Age	Name of property and percentage to inherit

*Note that you cannot create a trust of immovable estate in Jersey, so you cannot direct that your property is sole and the proceeds divided in a certain way.*

## Your moveable (personal) estate

You are required to appoint an executor of your Will covering your movable estate who will carry out your wishes in accordance with the terms of your will. An executor will apply for a Grant of Probate to your will of movable estate and is responsible for gathering in and accounting for all of your assets, settling your debts and then distributing the balance. In Jersey, the application for a Grant of Probate must be made by your executor in person, meaning they will have to fly to Jersey for this purpose or appoint a Jersey based Attorney to do this on their behalf. You might therefore wish to appoint a Jersey-based executor in the first instance.

Ogier has an executorship company that is set up to provide professional executor services if required, however there are costs involved with this that are usually deducted from the estate funds in due course.

## Executor

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<p>Would you like to name Ogier as your executor?</p>	<p>Yes</p> <p>No</p>
<p>If no - executor name and address</p>	<p>Name(s)</p> <p>Address</p>
<p>Substitutional executor name and address (in case the first named predeceases you or is unable or unwilling to act). Ogier can act in this regard if required.</p>	

## Assets

<p>Outline the extent of your movable assets, (bank accounts, investments, life policies, chattels, vehicles etc), where they are based and how they are held.</p>	
<p>If you are married or in a civil partnership, do you consider your household effects to be owned jointly?</p>	<p>Yes</p> <p>No</p>
<p>If no, please explain.</p>	

## Digital assets

<p>Do you hold any digital assets? (Bitcoin, Paypal, online accounts, music downloads)</p>	<p>Yes</p> <p>No</p>
<p>If yes, provide details</p>	

Are these held jointly or in your sole name?	
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You may not feel the need to specifically provide for these in your Will, but you should think about maintaining a list of online assets and their access details and passwords to make it easier for your executor to deal with these in due course.

## Beneficiaries

Do you wish to make any gifts of specific items or sum of money to people or charities?	Yes
	No

If yes, please give details:

Beneficiary name	Relation	Address	Details of item/cash amount

If you have a spouse, civil partner or partner, do you intend for these gifts to be immediately payable on your death or only if your spouse, civil partner or partner dies before you?	
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Who are the intended beneficiaries of your residual movable estate - that is, the rest of your movable estate after any gifts/legacies mentioned above have been paid out?

Beneficiary name	Relation	Address	Age	Shares to receive




In the event that the person/s named above do not survive you, who would you wish to benefit in their place?

Beneficiary name	Relation	Address	Age	Shares to receive

### Minor children and guardians

If you have children that are under the age of 18, do you wish to make provision to appoint someone to act as their guardian?	Yes
	No
If yes, provide details	

*Note that under Jersey Law you can only appoint one guardian, but you can appoint an alternate in case your first named guardian cannot act for some reason.*

# Funeral arrangements

Do you have any specific funeral instructions or wishes that you want to include in your will?	Yes No
Do you wish to be buried or cremated?	
Any other details?	

Find out more on [who can benefit your will](#), or what would happen if you don't leave a will.

## About Ogier

Ogier is a professional services firm with the knowledge and expertise to handle the most demanding and complex transactions and provide expert, efficient and cost-effective services to all our clients. We regularly win awards for the quality of our client service, our work and our people.

## Disclaimer

This client briefing has been prepared for clients and professional associates of Ogier. The information and expressions of opinion which it contains are not intended to be a comprehensive study or to provide legal advice and should not be treated as a substitute for specific advice concerning individual situations.

Regulatory information can be found under [Legal Notice](#)

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## Related Services

Private Wealth

Expat services

Local Legal Services

Legal

Estate Planning, Wills and Probate

Property law

## Related Sectors

Trusts Advisory Group