



Will questionnaire for foreign domiciled persons

Important – Jersey assets and classification

This questionnaire is intended to help you provide information for the preparation of your will. You are not resident in Jersey, but you have assets located in Jersey. In those circumstances, it is particularly important that you ensure the assets you list are complete, and are correctly identified and classified, including by reference to whether they are Jersey situs assets and whether they are movable or immovable.

Please take care not to include movable assets (for example, Jersey shares or interests such as share transfer apartments) in the "Immovable Property" section.

Ogier cannot accept responsibility if, as a consequence of any misclassification or omission in the information you provide, an asset is omitted from your will or is not dealt with as you intended.

If you are uncertain whether an asset is a Jersey asset, or how it should be classified, you must highlight this to us so that we can advise you before your will is finalised.

1. Personal Details

Full name

Maiden or former names

Current address

Date of birth Place of birth

Marital status

Have you been previously married or in a civil partnership? Yes No

If yes, when was this dissolved?

Home telephone number Mobile number

Email address

Domicile (your permanent home) – please provide details

2. Existing Wills

Do you have any existing Wills? Yes No

If yes, where are they held?

(We will need either the originals of these or copies – please contact Ogier to discuss further).

3. Your family

Full name (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 dependants such as step-children

4. Your capacity

In order to make a valid Will and 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 doctor confirming your capacity to make a Will or ask that your doctor acts 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? Yes No

If yes, please provide further details and the name of your doctor

5. Executor

You are required to appoint an executor of your Will covering your Jersey 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 movable Will and is responsible for gathering in and accounting for all of your Jersey assets and settling any debts and then distributing the balance.

Please note that in Jersey, the executor of a Will is required to make an actual physical appearance in the Royal Court of Jersey in order to make the application for the Grant of Probate to your Will. They will therefore need to travel to Jersey for this purpose, or appoint a local agent, such as Ogier, to act on their behalf by way of Power of Attorney. It can therefore be easier to appoint a local agent, such as Ogier, as executor of your Jersey Will 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.

Would you like to name Ogier as your executor? Yes No

If no - executor name and address

Substitutional executor name and address (in case the first named person predeceases you or is unable or unwilling to act). Ogier can act in this regard if required.

6. Your Jersey estate

Assets

Please outline the extent of your Jersey-based assets (bank accounts, investments, life policies, chattels, vehicles etc.) where they are based and how they are held (jointly/sole name).

Beneficiaries

Do you wish to make any gifts of specific items or sums of money to people or charities from your Jersey assets? 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 die before you?

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	Name of property and percentage to inherit

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

Any other details?