



## Will questionnaire for Jersey residents

### Important – classification of assets

This questionnaire is intended to help you provide information for the preparation of your will. It is your responsibility to ensure that the assets you list are complete and are correctly identified and classified.

In particular, please take care not to include movable assets (for example, 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 how any asset 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 ..... Marital status .....

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

If yes, when was this dissolved? .....

If yes, do you have a matrimonial agreement or an order of the court that affects or might affect how you wish to leave your assets in your Will? If yes, please provide a copy. Yes  No

Home telephone number ..... Mobile number .....

Email address .....

Domicile (your permanent home) – are you domiciled in Jersey? Yes  No

Were you born in Jersey? Yes  No

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

## 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 .....

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Addresses of children (if different from your own) .....

Full name and address of any other dependants such as step-children .....

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## 4. 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?

Yes  No

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

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Lasting Powers of Attorney enable you to appoint a trusted family member, friend or professional to ensure that your wishes in respect of your financial affairs and personal wellbeing are carried out should you lose mental capacity. Ogier's lasting power of attorney questionnaire enables you, in your own space and time, to put together all of the information needed for us to prepare draft lasting powers of attorney for you.

Please tick the box if you would like us to send you our lasting power of attorney questionnaire.

## 5. 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.

*Please note that share transfer property in Jersey is treated as a movable 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.*

## 6. Your immovable (real) estate (i.e. freehold property in Jersey).

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

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?

Do you own property outside of Jersey? (If yes, please 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

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

*Please 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.*

## 7. Your movable (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

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 predeceases you or is unable or unwilling to act).  
Ogier can act in this regard if required.

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**Assets**

Please outline the extent of your movable assets, (bank accounts, investments, life policies, chattels, vehicles etc), where they are based and how they are held.

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If you are married or in a civil partnership, do you consider your household effects to be owned jointly? Yes  No

If no, please explain.

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**Digital assets**

Do you hold any digital assets? (Bitcoin, Paypal, online accounts, music downloads) Yes  No

If yes, please provide details

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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 sums 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

### 8. 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, please provide details: .....

*Please 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.*

### 9. 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? .....