

ESTATE PLANNING QUESTIONNAIRE

Please complete as fully as you can. More detail helps us advise you properly.

If unsure, write "Not sure", "N/A", or "To discuss". Attach extra pages if needed.

Your information will be kept confidential and used only for estate planning advice.

PERSONAL AND CONTACT DETAILS

Full name	Other names previously used
Date of birth	Nationality
Home address	Postcode
Telephone number	Email address
Occupation	Preferred method of contact

Current relationship status:

☐ Single ☐ Married ☐ Civil partnership ☐ Widowed ☐ Divorced ☐ Separated
☐ Cohabiting / partner ☐ Other

Marriage / partnership type (if applicable): ☐ Nikah only ☐ Civil only ☐ Both ☐

Previously married / in a civil partnership? ☐ Yes ☐ No *(If yes, give brief details of any settlement, court order, or ongoing obligation.)*

Details:

Any ongoing financial obligations to a former spouse, partner, or children from a previous relationship?

☐ Yes ☐ No *(If yes, give details below.)*

Any health, capacity, vulnerability, or support needs relevant to planning?

☐ Yes ☐ No *(If yes, give details below.)*

FAMILY STRUCTURE

Relative category	Number living	Notes (optional)
Spouse / civil partner		
Mother		
Father		
Grandparents		
Brothers		
Sisters		
Grandchildren		

CHILDREN AND DEPENDANTS

Name	Date of birth / age	Relationship to you <i>(adopted, stepchild)</i>	Gender	Marital status	Notes <i>(e.g. financially dependent)</i>

ASSETS

<i>List sole, joint, trust, or business-held assets. Estimates are fine.</i> Asset category	Description	Ownership <i>(e.g. sole, joint tenants, tenants in common)</i>	Estimated value (£)	Notes
Main residence <i>Include purchase date & price, shares, occupiers, and any trust.</i>				
Other property <i>Include purchase date & price, rental, overseas, or former homes.</i>				

Bank and savings accounts				
Investments and shares				
Pensions <i>Include type and any nominated beneficiaries, if known.</i>				
Business interests <i>Include ownership %, key shareholders, and succession issues.</i>				
Life insurance and policies				
Cash and valuables				
Other assets <i>E.g. trust interests, digital assets, cryptoassets.</i>				

LIABILITIES

<i>Include personal, business, and contingent liabilities. Estimates are fine.</i> Liability type	Estimated amount (£)	Notes
Mortgage		
Personal loans		
Credit cards		
Business debt		
Tax or HMRC liabilities		
Other liabilities <i>E.g. guarantees, family loans, contingent liabilities.</i>		

LIFETIME GIFTS AND TRANSFERS

<i>Include significant gifts, transfers, or forgiven loans.</i> Recipient	Relationship to you	What was given?	Estimated value (£)	Date	Notes <i>Trust gifts, support, forgiven loans, or retained benefit.</i>

Have you transferred property to children or others while continuing to live in it or benefit from it?

☐ Yes ☐ No *(If yes, please provide details.)*

LEGAL AND BACKGROUND INFORMATION

Do you have a will? ☐ Yes ☐ No *(If yes, give the date, storage location, and whether it still reflects your wishes.)*

Any foreign or overseas assets? ☐ Yes ☐ No

Any will or succession document in another country or jurisdiction? ☐ Yes ☐ No

Do you have any Lasting Powers of Attorney? ☐ Yes ☐ No *(If yes, state which type and whether the attorneys are still suitable.)*

If you have a will, does it appoint executors? ☐ Yes ☐ No ☐ Not sure *(If yes, are they still suitable?)*

Previously discussed with: ☐ Imam ☐ Solicitor ☐ Financial adviser ☐ Other

Previous advice, decisions, or arrangements:

ISLAMIC AND ETHICAL CONSIDERATIONS

Outstanding zakat or other religious / ethical obligations?

Charitable giving, loans, waqf intentions, or other faith-based wishes?

Any ethical wishes or instructions, e.g. strict faraid, flexibility, fairness concerns, or other guidance?

OBJECTIVES AND CONCERNS

Main priorities:

- ☐ Islamic compliance ☐ Tax efficiency ☐ Avoiding disputes ☐ Asset protection
☐ Housing security ☐ Fair distribution ☐ Protecting vulnerable beneficiaries ☐
Other

What would you most like advice or clarity on?

ADDITIONAL NOTES

DECLARATION

I confirm that this information is true and accurate to the best of my knowledge and is provided for estate planning advice.

Full name:

Signature:

Date: