

Lasting Powers of Attorney

Questionnaire

To be completed in conjunction with our Factsheet

Specialist services from the Tax and Estate Planning Department

1. The Discovery Process

IMPORTANT Please read this notice

The terms under which we provide legal services are strictly controlled in accordance with the guidance of our Regulator, the Solicitors Regulation Authority. These regulations are in place to protect you and to help us ensure the legal services that we provide are accurate.

Frequently we are asked to have an initial meeting with potential clients to establish whether:-

- the potential client wants to instruct us, and
- we have the relevant legal expertise, and
- the level of our fees is acceptable, and
- the members of our team are compatible with the potential client.

In all cases, there must be a clear understanding of the basis on which the first meeting is held and the extent of our responsibilities, whether or not you decide to instruct us.

In accordance with our regulatory requirements, we maintain a professional indemnity insurance policy. In order that you may be assured that our advice is covered by that policy, you will need to formally retain us, regardless of whether you decide to instruct us beyond the first meeting.

On the following page you will find our Retainer which should be read in conjunction with our terms and conditions.

Thank you for your attention to this.

2. Terms - The Discovery Process

We ask that you complete this before we meet.

There is no obligation to instruct us beyond the Initial Meeting, however if you do not, this meeting will be charged at a fixed fee of £150 plus VAT. Should you choose to instruct us in the preparation of Lasting Powers of Attorney, this fixed charge will <u>not</u> be made but the fees set out in our Factsheet will apply.

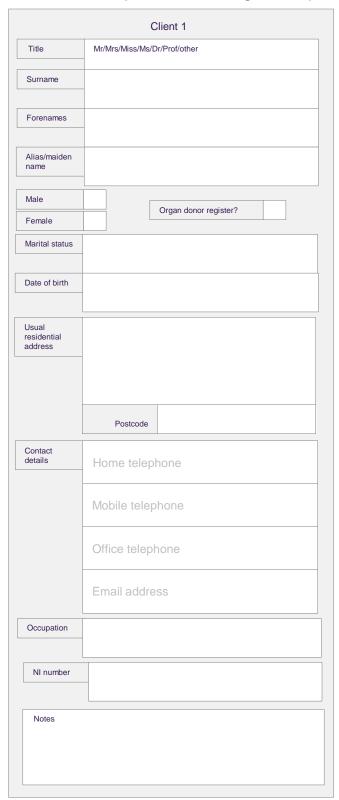
The Initial Meeting performs an important function of allowing you to determine whether you would like to retain us and for us to determine whether you qualify to be a client of this firm.

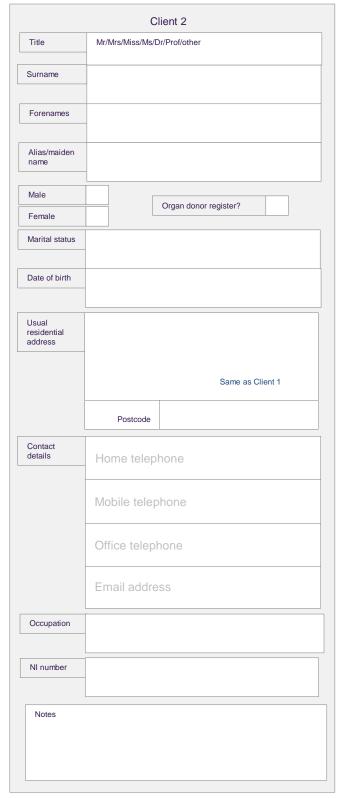
Therefore, whether or not we continue to act for you beyond your Initial Meeting, please read the following and sign below to acknowledge that:-

- 1. there is no obligation to engage Whitehead Monckton beyond the Initial Meeting,
- if Whitehead Monckton incurs reasonable disbursements (such as Land Registry fees)
 during (and necessary to) the Initial Meeting you shall pay these whether or not you continue to instruct Whitehead Monckton,
- you should not rely on the discussions in the Initial Meeting and any information you receive
 unless it is supported by written Legal Advice contained in a letter or other documents from
 Whitehead Monckton,
- you acknowledge that you shall complete this questionnaire as fully as possible and to the best of your knowledge information and belief the information is correct,
- For the purpose of the Initial Meeting you are engaging Whitehead Monckton as your
 Solicitors in accordance with the firm's Terms and Conditions.

Client 1 print name	Client 2 print name
Client 1 signature	Client 2 signature

3. About You





4. Family Tree

marriage by '=' and writing the ages of any person under the age of 18.					

5. Schedule....assets

			Assets	(estimated)	
		Client 1	Client	12	Joint
Main home	£		£	£	
Other property	£		£	£	
Foreign property	£		£	£	
Cars	£		£	£	
Personal chattels	£		£	£	
Other	£		£	£	
Other	£		£	£	
Total	£		£	£	
		Client 1	Client	. 2	Joint
Bank current a/c	£	OliGift 1	£	£	John
Bank savings a/c	£		£	£	
Cash ISAs	£		£	£	
Other ISAs	£		£	£	
Investment Bonds	£		£	£	
Premium Bonds	£		£	£	
Other NS&I	£		£	£	
Unit Trusts	£		£	£	
Stocks and shares	£		£	£	
Business Interests	£		£	£	
Other	£		£	£	
Other	£		£	£	
Other	£		£	£	
	£		£	£	

6. Schedule....liabilities & income

		Liabilities	
	Client 1	Client 2	Joint
Mortgage - Main home	£	£	£
Mortgage - other	£	£	£
Secured loans	£	£	£
Personal loans	£	£	£
Hire purchase	£	£	£
Credit cards	£	£	£
Finance	£	£	£
Guarantees	£	£	£
Other	£	£	£
Other	£	£	£
Other	£	£	£
Total	£	£	£

	011	
	Client 1	Client 2
Main employment	£	£
Pensions	£	£
Bank interest	£	£
Share dividends	£	£
Other	£	£

7. Attorney(s)

	Attorney 1	Each other		Attorney 2
Title	Mr/Mrs/Miss/Ms/Dr/Prof/other		Title	Mr/Mrs/Miss/Ms/Dr/Prof/other
Surname	-		Surname	
Forenames	-		Forenames	
Date of birth	-		Date of birth	
Relationship to you			Relationship to you	
Usual residential address			Usual residential address	
	Postcode			Postcode
Contact details	Home telephone		Contact details	Home telephone
	Mobile telephone			Mobile telephone
	Office telephone			Office telephone
	Email address			Email address
Occupation	-		Occupation	
Any other notes			Any other notes	
	Appointment:: (please only choo	se Joint	Joi	int & several

8. Replacement Attorney(s)

Mr/Mrs/Miss/Ms/Dr/	Prof/other			Title	Mr/
				Surname	
				Forenames	
				Date of birth	
				Relationship to you	
				Usual residential address	
Postcode				0.7171	
Home teleph	one			details	H
Mobile telepl	none				N
Office teleph	one				C
Email addres	SS				E
				Occupation	
				Any other note:	S
	Home teleph Mobile teleph Office teleph	Postcode Home telephone Mobile telephone Email address	Home telephone Mobile telephone Office telephone Email address	Home telephone Mobile telephone Office telephone Email address	Postcode Home telephone Mobile telephone Email address Occupation Any other notes

Title	Mr/Mrs/Miss/Ms/Dr/Prof/other	
	-	
Surname		
Forenames		
Date of birth	_	
Relationship to you		
Usual residential address		
	Postcode	
Contact details	Home telephone	
	Mobile telephone	
	Office telephone	
	Email address	
Occupation		
Any other notes	5	

9. Restrictions & Guidance

If you would like your Attorneys to have restricted powers or you would like to offer them guidance in carrying out their role please note this here. Please take note of our advice at section 4 of our Factsheet.

<u>Restrictions</u>	<u>Guidance</u>

10. Life Sustaining Treatment

Health & Welfare LPAs ONLY:

At the time of executing the Health and Welfare LPA you will be asked to confirm whether you wish you Attorney(s) to have the authority to accept or refuse life sustaining treatment on your behalf.

Please indicate your intended authority:

I/we DO wish to give my/our Attorney(s) authority to accept or refuse life sustaining treatment on my/our behalf	
I/we DO NOT wish to give my/our Attorney(s) authority to accept or refuse life sustai treatment on my/our behalf	ning

11. Registration... The Office of the Public Guardian

Your Lasting Powers of Attorney cannot be used by your Attorneys until they are registered at the Office of the Public Guardian. In most circumstances we recommend you register the document(s) immediately to avoid delay at the time they are required, however you should discuss this with us for tailored advice to suit your circumstances.

suit your circumstances.		
Registration		
I do wish to register the documents no	OW	
I do not wish to register the documen	nts now	
Notice		
The registration process involves s Whitehead Monckton legal advisor them. Otherwise, please provide de	acts as your Certificate P	rovider then you can notify
Notify somebody at Whitehead Mono	ekton	
	<u>or</u>	
Full name(s) & addresses	<u>Relationship</u>	Date of Birth
1.		
2.		
3.		

What Next?

This questionnaire is a key stage in the Discovery Process for the Initial Meeting.

The questionnaire is deliberately comprehensive and we make no apologies for that. By giving us information about you to the level contained here, you are giving yourself the best opportunity of receiving the bespoke advice that your circumstances deserve.

It is our experience that having the completed questionnaire before the meeting will result in a productive Initial Meeting.

Please email a scanned copy of the completed questionnaire to

enquiries@whitehead-monckton.co.uk

Alternatively please send it to us by facsimile.

Thank you.

The Initial Meeting

If this is the first time we have acted for you, or if we haven't acted for you in the last three years, we are required to verify your identity and address. When you visit us, please produce the original of one document from each of the following two categories

Proof of Identity (the document MUST include a photograph)

- · Current valid passport
- National identity card/validated
 National Insurance number
- · Current driving licence
- For companies incorporation certificate

Proof of Address (no more than 3 months old)

- Utility Bill
- Council Tax bill
- Bank/Credit Card statement

Please instruct us before our meeting if this is likely to cause any problems for you.

Canary Wharf

2 Beatty House Admirals Way Canary Wharf, Docklands E14 9UF dx 42688 Isle of Dogs t. 020 7531 2990 f. 020 7531 2992

Canterbury

32-33 Watling Street Canterbury Kent CT1 2AN dx 5314 Canterbury t. 01227 643250 f. 01227 643260

Maidstone

5 Eclipse Park
Sittingbourne Road
Maidstone
Kent
ME14 3EN
dx 4807 Maidstone 1
t. 01622 698000
f. 01622 690050

Tenterden

3-4 Market Square High Street Tenterden Kent TN30 6BN dx 39003 Tenterden t. 01580 765722 f. 01580 765180

e. enquiries@whitehead-monckton.co.uk

Docklands Solicitors is a trading name of Whitehead Monckton Limited which also has offices in Canterbury, Maidstone and Tenterden. Whitehead Monckton Limited (no. 08366029), registered in England & Wales. Registered office 5 Eclipse Pak, Sittingbourne Road, Maidstone, Kent, ME14 3EN. Authorised and regulated by the Solicitors Regulation Authority under no. 608279

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With offices in Canary Wharf, Canterbury, Maidstone and Tenterden Whitehead Monckton has grown to be one of the largest legal practices in the county.

We balance our practice between our business and personal clients. This ensures that every single client will receive the very best advice, support and quality of work, no matter what their background, tailored to their specific needs.