

# Lasting Powers of Attorney Questionnaire

— To be completed in conjunction with our Factsheet

Specialist services from the Tax and Estate Planning Department

[whitehead-monckton.co.uk](http://whitehead-monckton.co.uk)



# 01

## 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.

# 02

## Terms

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 £425 plus VAT. Should you choose to instruct us in the preparation of Lasting Powers of Attorney, this fixed charge will not 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:-

- 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)

03

About You

Please complete the following as comprehensively as possible

Client 1		Client 2	
Title		Title	
Surname		Surname	
Forenames		Forenames	
Gender		Gender	
Marital status		Marital status	
Age		Age	
DOB		DOB	
Address		Address	
Postcode		Postcode	
Telephone		Telephone	
Mobile		Mobile	
Email		Email	
Occupation		Occupation	
NI number		NI number	
Notes		Notes	



04

Family Tree

It is helpful to us if you sketch your family tree below, indicating marriage by ‘=’ and writing the ages of any person under the age of 18



05

Assets (estimated)

Please complete the following as comprehensively as possible

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



06

Liabilities & Income

Please complete the following as comprehensively as possible

Liabilities

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

Gross Annual Income

Client 1	£	Client 2	£
Main employment		Main employment	
Pensions		Pensions	
Bank interest		Bank interest	
Share dividends		Share dividends	
Total		Total	

If you intend to apply for a fee remission or exemption you will need to provide evidence of your income



07

Attorney(s)

Please complete the following as comprehensively as possible

Attorney 1		Each Other		Attorney 2	
Title				Title	
Surname				Surname	
Forenames				Forenames	
Date of birth				Date of birth	
Relationship to you				Relationship to you	
Usual Residential Address				Usual Residential Address	
Postcode				Postcode	
Telephone				Telephone	
Mobile				Mobile	
Office				Office	
Email				Email	
Occupation				Occupation	
Notes				Notes	

Appointment: (please only choose <u>one</u> option)	Joint	Joint and several



07

Attorney(s)

Please complete the following as comprehensively as possible

Attorney 3		Each Other		Attorney 4	
Title				Title	
Surname				Surname	
Forenames				Forenames	
Date of birth				Date of birth	
Relationship to you				Relationship to you	
Usual Residential Address				Usual Residential Address	
Postcode				Postcode	
Telephone				Telephone	
Mobile				Mobile	
Office				Office	
Email				Email	
Occupation				Occupation	
Notes				Notes	

Appointment: (please only choose <u>one</u> option)	Joint	Joint and several



08

Replacement Attorney(s)

Please complete the following as comprehensively as possible

Replacement Attorney 1		Each Other		Replacement Attorney 2	
Title				Title	
Surname				Surname	
Forenames				Forenames	
Date of birth				Date of birth	
Relationship to you				Relationship to you	
Usual Residential Address				Usual Residential Address	
Postcode				Postcode	
Telephone				Telephone	
Mobile				Mobile	
Office				Office	
Email				Email	
Occupation				Occupation	
Notes				Notes	

Appointment: (please only choose one option)

Joint☐

Joint and several☐

08

Replacement Attorney(s)

Please complete the following as comprehensively as possible

Replacement Attorney 3		Each Other		Replacement Attorney 4	
Title				Title	
Surname				Surname	
Forenames				Forenames	
Date of birth				Date of birth	
Relationship to you				Relationship to you	
Usual Residential Address				Usual Residential Address	
Postcode				Postcode	
Telephone				Telephone	
Mobile				Mobile	
Office				Office	
Email				Email	
Occupation				Occupation	
Notes				Notes	

Appointment: (please only choose one option)

Joint☐

Joint and several☐

# 09 Preferences

If you would like to offer your Attorney(s) any guidance in carrying out their role please note this here. Please take note of our advice at section 4 of our Factsheet

# 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 sustaining treatment on my/our behalf



# 11 Registration

The Office of the Public Guardian

**Notice** — As part of the registration process you can serve notice on up to five people of your choice. This is **optional** but if you would like to notify anybody please provide their details here:

	Full name(s) & addresses	Relationship to you	Date of Birth
1.			
2.			
3.			
4.			
5.			





# 11

## Registration

The Office of the Public Guardian

Your Lasting Powers of Attorney cannot be used by your Attorney(s) 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. Please take note of the information at **section 7 of our Factsheet**.

Registration –  
when to register  
the documents

I do wish to register  
the documents now

I do not wish to register  
the documents now

Property & Financial  
Affairs LPAs only –  
when do you want  
your Attorney(s)  
to act?

As soon as the Lasting Power(s)  
of Attorney are registered (recommended)

Only when I do not have  
mental capacity

## Next Steps

### 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 advise us before our meeting if this is likely to cause any problems for you.

### 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 [tepsupport@wmlaw.uk](mailto:tepsupport@wmlaw.uk)

Alternatively please bring it along with you to our meeting.

Thank you.

Please indicate  
here whether you  
are making:

Both types of LPAs

Property & Financial Affairs only

Health & Welfare only



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

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.



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