

## Nuptial agreement questionnaire

**This questionnaire helps us collect information from you relating to your personal and financial circumstances so we can ensure we meet your objectives when advising you on your nuptial agreement.**

By submitting your email address and telephone number to us you consent to us contacting you to deal with your enquiry. Calls may be recorded for training and monitoring purposes. For more information on our privacy notice, [please click here](#).

Please refer to yourself throughout this questionnaire as Party 1 and the other party to your agreement as Party 2.

**Please do not send us any documents relating to your personal or financial circumstances or relating to Party 2. Only provide information in this questionnaire relating to Party 2 so far as is known to you. Do not copy or take any documents or records belonging to Party 2.**

If you are not able to answer all the questions, please don't worry.

## About you

	Party 1	Party 2
Title		
First name(s)		
Middle name(s)		
Surname		
Date of birth		
Nationality		
Home address (including postcode)		
Telephone number(s)		
Email		
<b>Any health issues to consider and if so please provide details?</b>		
Yes	No	Unsure

Details

**Any previous marriages or previous relationships to note and if so, please provide details in the box below?**

Yes

No

Unsure

Details

## About your family

### Children of both parties

Please use this section to provide information about your children who are under the age of 18 or still financially dependent on you. If you are not both the biological parents of the children please confirm details, for example adopted children or stepchildren.

Full Name	DOB	Detail any health issues, disabilities, or special educational needs	School/nursery/college name and address	If fee paying, please confirm the fees per year and who pays them


**Children from previous relationships**

Please use this section to provide information about children from previous relationships who are under the age of 18 or still financially dependent on you. If you are not the biological parents of the children please confirm details, for example adopted children or stepchildren.

Please include details of any financial provision being paid or due to be paid (for example school, nurse, or college fees) and any arrangements in place for the payment of child maintenance and if so the amount and frequency of the payment (per month, per week or per annum) and whether this is a voluntary arrangement, following a Child Maintenance Service assessment or under the terms of a court order.

If you need extra space when answering any of the questions, please use the additional information box at the end of this section.

<b>Full Name</b>	<b>DOB</b>	<b>Living and contact arrangements</b>	<b>Detail any health issues, disabilities, or special educational needs</b>	<b>Child of Party 1 or 2</b>	<b>Details of any financial provision or maintenance being paid</b>


**Plans for children**

<b>Do you have plans to have children with Party 2?</b>	Yes	No	Unsure
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**Any other individual who lives with you or is financially maintained by either of you**

Please use this section to provide information about any other individuals who rely upon you financially (for example relatives who may live with you).

Full Name	DOB	Address	Dependent of Party 1 or Party 2	Details of financial provision being made

Details

## Domicile and residence

**Habitual residence** is the place (meaning country) in which your life is mainly based. This may be the place where you work, own property, your children go to school and where your main family life takes place. It is the place where you are settled and intend to stay settled.

**Domicile** is the country you treat as your main permanent home in which you live, or to which you intend to return. When you were born you will have acquired your parents' domicile. If you have since moved to another country and made that your permanent home, then your domicile may have moved there.

If you were born in England or Wales, lived your entire life here, and intend to stay here, then it is very likely that you'll be both habitually resident and domiciled here.

	Party 1		Party 2	
<b>Is your habitual residence in England/Wales? If no, please confirm where you are resident</b>	Yes	No	Yes	No
	Place of residence		Place of residence	
<b>Are you domiciled in England/Wales? If no, please confirm country of domicile</b>	Yes	No	Yes	No
	Country of domicile		Country of domicile	
<b>Are you resident outside of England/Wales for tax purposes?</b>	Yes	No	Yes	No
<b>Do you have plans to live outside of England/Wales?</b>	Yes	No	Yes	No
<b>Will you need advice on your agreement being relied upon in any other jurisdiction and if so, where?</b>	Yes	No	Yes	No
	Jurisdiction		Jurisdiction	

## Cohabitation and any existing declarations of trust

To help us advise you on the right level of agreement we need to understand whether you are already cohabiting or own property together or whether you are planning to live together for the first time.

There are two aspects to the ownership of property; the legal title to property and the beneficial interests in it (the right to receive the profits or income from a property or the right to live in it). Both may be vested in the same people, but this is not always the case.

If you already own a property together, you may have a declaration of trust (also known as a deed of trust) in place from the time of purchase or subsequently entered into one. A declaration of trust is a legal document in which the legal owners of the property declare that they hold the property on trust for the beneficial owners and it sets out the shares in which the beneficial interests are held.

At the time of buying the property your conveyancer would have given you the choice of holding the beneficial interests in the property as joint tenants or tenants in common (either in equal or unequal shares). If you are unsure whether there is a declaration of trust in place or whether you are joint tenants or tenants in common don't worry.

If you need extra space when answering any of the questions, please use the additional information box at the end of this form.

<b>Do you already live together and if so when did your cohabitation start?</b>	Yes		No	
	Date cohabitation started			
<b>What is the full address including postcode of the property you intend to live in following your marriage?</b>				
<b>Do you have a cohabitation agreement?</b>	Yes	No	Unsure	
<b>If you already own the property you intend to live in following your marriage was a declaration of trust entered into at the time of purchase or subsequently and if so, please confirm so far as is known to you what it says about the beneficial ownership of the property?</b>				
<b>Is there anyone other than you and Party 2 with a beneficial interest in your property and if so, please provide details?</b>	Yes	No	Unsure	
<b>Details</b>				

## Income

	Party 1			Party 2		
<b>Occupation</b>						
<b>Please confirm if you are employed or self employed</b>						
<b>Earned or self-employment income</b>	Gross £			Gross £		
	Per annum			Per annum		
<b>Please provide details of any bonuses or other occasional payments</b>						
<b>Please provide details of income from any other sources (investments, state benefits, etc)</b>						
<b>Please confirm if there are any likely changes to your income position</b>	Yes	No	Unsure	Yes	No	Unsure
<b>If there are likely to be any changes, please provide details</b>						

## Contents of your nuptial agreement

<b>Date of marriage or if no date is yet fixed, please confirm</b>	
<b>To help us advise you on the type of agreement needed please briefly summarise your reasons for wanting to enter into an agreement and what your objectives are</b>	Reasons and objectives:

## 2Unify service

Our 2Unify service offers you relationship coaching alongside the preparation of your nuptial agreement. This service will help you lay the foundations for a strong and secure marriage. [Click here for further information about this service](#)

<b>Would you like to use our 2Unify service or find our further information about it?</b>	Yes	No	Unsure

## Wills and estate planning

We do not have a Will department, however, we do work closely with a trusted network of lawyers we can call upon to assist you with a Will or estate planning or we can work with your existing lawyers.

<b>Do you have an existing UK Will?</b>	Yes	No	Unsure
<b>Do you have any existing Powers of Attorney?</b>	Yes	No	Unsure
<b>Do you have an existing Will in a foreign jurisdiction?</b>	Yes	No	Unsure

## Independent legal advice

Parties to a nuptial agreement need to be separately advised and represented.

<b>Does Party 2 already have a lawyer and if so, please provide their details in the box below?</b>	Yes	No
<b>If Party 2 doesn't already have a lawyer, would you like us to make recommendations of lawyers who can help?</b>	Yes	No
<b>Contact details for Party 2's lawyer</b>		



## Confidentiality

A nuptial agreement will include a confidentiality clause, however, the clause will only become binding and operative once the nuptial agreement has been signed. Before any information and documentation is provided to Party 2 and their legal advisers a confidentiality agreement can be entered into.

<b>Do you require a confidentiality agreement?</b>	Yes	No	Unsure
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## Professional advisors

It may be helpful for your professional advisors to work alongside us. We will not make contact without your express permission.

	Party 1		Party 2	
<b>Do you use a financial advisor?</b>	Yes	No	Yes	No
<b>If yes, please provide their name and contact details</b>				
<b>Do you use an accountant?</b>	Yes	No	Yes	No
<b>If yes, please provide their name and contact details</b>				

## Additional information

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Please use the box below to provide us with any additional information you think it would be helpful for us to know.

## Next Steps

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- Please tick to confirm you agree to WM Law Ltd trading as Watson Morris holding the information you provide about yourself in accordance with our privacy notice. For more information on our privacy notice, [please click here](#).
  
- Please tick to confirm your consent to us providing a copy of this form to one of our trusted will and estate planning lawyers to ask them to get in touch with you to quote for their services.

Thank you for taking the time to complete this form. Please now date the form and send it back to [enquiries@watson-morris.co.uk](mailto:enquiries@watson-morris.co.uk)

We will contact you once we have reviewed your form to discuss your requirements and the next steps.

Please note that if we do not receive your instructions to proceed with advice on a financial settlement on your behalf within 12 months of you completing this questionnaire, we will destroy all correspondence (including email correspondence) and documentation (including your completed questionnaire).

<b>Dated</b>	
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