

Your Will planner checklist



Please complete this checklist and take it with you to your solicitor when making your will. Greater detail may be required by your solicitor or will writer.

It is a good idea to keep the checklist with a copy of your will and let your next-of-kin and Executors know where to find them.

Your name and address

Your partner's name and their address (if different)

Children's names and their addresses (if different)

If children under 18, who would you like to appoint as guardian? – name and address

Who would you like to appoint as executors

Your executors' full names and addresses

Assets

Property (list your major assets and their approximate current value)

| | |
|---|----------|
| Your home and any other property or land | £ |
| Your second or holiday home/caravan | £ |
| Your home contents including furniture and fittings etc. | £ |
| Items of particular value e.g. jewellery or art or antiques | £ |
| Cars and other vehicles | £ |
| Other | £ |
| Total | £ |

Financial

| | |
|---|----------|
| Money in banks or building societies | £ |
| Stocks, shares, investments etc. e.g. National Savings, Premium Bonds | £ |
| Pension/benefits | £ |
| Insurances and Life Assurances | £ |
| Business assets | £ |
| Other financial interests, savings and assets | £ |
| Total | £ |

Total assets £



Liabilities

Money you owe

| | |
|------------------------------------|----------|
| Mortgage outstanding | £ |
| Other loans | £ |
| Overdrafts | £ |
| Credit or hire purchase agreements | £ |
| Credit card debts | £ |
| Other money owed | £ |
| Total | £ |

Money you are owed

| | |
|-----------------------------------|----------|
| Name and address of debtor(s) | |
| Date of loan / Amount outstanding | £ |
| Date of loan / Amount outstanding | £ |
| Date of loan / Amount outstanding | £ |
| Total | £ |

Total liabilities £

Assets – liabilities: Total estate value £



Gifts

Use this table to plan the gifts you'd like to leave to each person or charity.

You can leave a specific bequest (an item), a pecuniary bequest (a fixed amount of cash) or a residuary bequest (a percentage of the remainder of your estate after all necessary deductions).

| Name and address | % share (a residuary bequest) | Fixed amount (a pecuniary bequest) | Specific item |
|------------------|-------------------------------------|--|---------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

If any of the people you mentioned don't survive you, what would you like to happen to their gift?

Choice of executors

It is common to appoint a trusted family member or friend. A solicitor can also act as an Executor but please note there is normally a charge for this service.

| Name | Address | Relationship to me |
|------|---------|--------------------|
| | | |
| | | |

