

YOUR WILL PLANNING CONSIDERATIONS

Making a Will involves a number of decisions. In order to properly prepare a Will you should have an estimate as to your total estimates and liabilities. This is your personal checklist to help you prepare for your visit to your chosen solicitor if you wish to use it.

Take the planner with you, along with any previous Will and a form of personal identification such as a Current valid (signed) Full UK Passport or Current Full UK Driving License; Address verification such as recent utility bill – Gas, Electricity, Water and Telephone.

What is the value of your assets?

Asset Type	Asset Details	Asset Details	Asset Details	Total Value
Property or land				
Cars and other vehicles				
Home contents				
Items of particular value				
Banks, building societies etc				
Shares, Investments, Premium Bonds				
Insurance and pensions				
Other assets				

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Total Assets

£.....

What are your liabilities?

Liability Type	Liability Details	Liability Details	Liability Details	Total Value
Mortgage				
Loans and overdrafts				
Your credit cards				
Credit or HP agreements				
Other liabilities				

Total Liabilities

£.....

Assets *minus* Liabilities =

Total Estate Value

£.....

YOUR WILL PLANNING CONSIDERTIONS

Your partner's name and address:

(only if it is different from your own)

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Children's full names and addresses:

(only if different from your own)

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Guardian's full name and addresses:

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Executor's full name and addresses:

(Max 4)

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Specific Item Bequests:

Write down in full the name and address of all individuals and charities (Inc. Charity Registration numbers) you want to benefit together with a brief description of the item.

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Pecuniary Bequests (Cash gifts)

Write down in full the names and addresses of all individuals and charities (Inc. Charity Registration numbers) you want to benefit and the amount.

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Residuary Bequests (Left over estate after cash gift and expenses)

Write down in full the names and addresses of all individuals and charities (with registered charity numbers), together with their proportion of the residue of your estate.

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What would you like to happen to your bequests if any of your beneficiaries die before you do?

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YOUR WILL PLANNING CONSIDERTIONS

Pet instructions for rehoming
Funeral preferences, examples for consideration: <ul style="list-style-type: none">• Burial / Cremation / Medical research etc.• Where to scatter / intern ashes• Floral tributes and / or charity donations

Questions for solicitor/will-writer:

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IMPORTANT NOTE

- REMEMBER THIS IS YOUR PERSONAL PLANNER TO TAKE TO HELP YOU PREPARE FOR YOUR VISIT TO YOUR CHOSEN SOLICITOR/WILL WRITER. YOU DO NOT HAVE TO USE THIS BUT IT MAY SAVE YOU TIME IN YOUR MEETING IF YOU DO.
- PLEASE DO NOT RETURN THIS PLANNER WITH YOUR REGISTRATION FORM. TAKE IT TO YOUR APPOINTMENT.
- THE WILL PLANNER CANNOT BE USED AS A VALID WILL.

YOUR WILL PLANNING CONSIDERTIONS

Useful guide to legal terms around writing a Will

Administrator	Someone appointed by law to settle your affairs if you die without a Will.
Affidavit	Sworn statement.
Assets	One's property and possessions.
Beneficiary	A person or organisation who receives something in your Will.
Bequest / Legacy	A gift which is documented in a Will.
Codicil	A separate document which makes a change or addition to the terms of an existing Will.
Estate	The total of what is left including all property, effects and money, less any outstanding debts.
Executor	A person appointed in a Will to administer the estate. (This may be a friend, family or solicitor). A beneficiary can also be an executor. You can appoint more than one executor.
Distribution	Giving out estate property to beneficiaries.
Dying Intestate / Intestacy	To die without making a Will.
Guardian(s)	The person(s) who will look after the parent's children in the event of their death.
Probate	A document that officially establishes that a proper Will has been made and is valid, additionally it confirms the Executor(s).
Pecuniary bequest	A gift of a sum of money in a Will.
Residuary bequest	Residue is that which remains after all the testamentary debts, tax due, pecuniary legacies and administration costs have been paid. This can be a gift of all or part of the residue to an estate.
Specific bequest	A gift of a particular item e.g. house, car, painting etc. in a Will.
Testator / testatrix	A person who has made a Will. Male is Testator and Female is known as Testatrix.
Will	Legally binding written declaration by a person of their wishes regarding disposal of their property after their death.
Witness	A person who observes and vouches for your signature. (Two witnesses are required for a Will, these cannot be beneficiaries)

We hope you find the Will promotion beneficial.

Thank you for your interest.