

Will Planner



This Will Planner is to help you prepare for questions your solicitor will ask you. Thinking about and completing these questions beforehand will help to save time and make the Will-writing process more efficient. If you are unsure about any of the questions, the solicitor will be happy to discuss them with you.

1. First partner

Full Name:..... **Date of Birth:** / /

Address:

..... **Post code:**

Telephone Number: (Home)..... (Cell)

Marital Status: Single Divorced Engaged Remarried Married Widowed Separated

2. Second partner

Full Name:..... **Date of Birth:** / /

Address:

..... **Post code:**

Telephone Number: (Home)..... (Cell)

Marital Status: Single Divorced Engaged Remarried Married Widowed Separated

3. Children

Full Name	Address	Date of Birth	Status*

* Whether the child is from this relationship, a previous relationship or other circumstances.

4. Do you have an existing Will?

You: Yes No

Your Spouse or Partner: Yes No



5. Nominated guardians for any child yet to reach adulthood

Full name	Address

6. Do you have any particular funeral wishes?

7. The value of your estate

This section helps you work out the value of your estate.

The value of your major assets

Your home (or your share in it)	<input type="text" value="£"/>
Other property or land	<input type="text" value="£"/>
Cars and other vehicles	<input type="text" value="£"/>
Home contents including furniture and fittings	<input type="text" value="£"/>
Items of particular value (e.g. jewellery or art)	<input type="text" value="£"/>
Money in banks and savings institutions	<input type="text" value="£"/>
Shares of stock, investments, bonds	<input type="text" value="£"/>
Insurance and pensions	<input type="text" value="£"/>
Other savings and assets	<input type="text" value="£"/>
Total Assets	<input type="text" value="£"/>

Your major liabilities

Your mortgage	<input type="text" value="£"/>
Loans and overdrafts	<input type="text" value="£"/>
Credit cards	<input type="text" value="£"/>
Credit or other debts	<input type="text" value="£"/>
Other liabilities	<input type="text" value="£"/>
Total Liabilities	<input type="text" value="£"/>

Assets less liabilities = estate value

8. Bequests

Specific items e.g. cars, ornaments, jewellery. List the names and addresses of individuals and charities* to whom you would like to make a specific gift.

Name	Address	Description

Bequests (set amounts of money). List the names and addresses of individuals and charities* to whom you would like to leave a specific sum of money

Name	Address	Amount (£)

Residual bequests (a percentage or all of the remainder of your estate). List the names and addresses of individuals and charities* to whom you would like to leave a proportion of your estate

Name	Address	Amount (£)

* including registered charity numbers

9. 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 of Executors: (1)

(2)

Address of Executors: (1)

.....

(2)

.....

Relationship to you: (1)

(2)

Making your Will is vital, enabling you to set down what you want to happen to your belongings and property after you are no longer here. A Will is also helpful to your family and friends in the aftermath of your passing.

Writing your Will is also an opportunity to do something lasting for a charity, furthering its cause way into the future. A share of your estate, after you have made provision for family and friends, is a particularly tidy way of helping a charity and prevents you having to decide now on a precise sum.

This Will Planner is intended to help you mainly by encouraging you to think about the questions you should discuss with your solicitor. It will save you time (and therefore money) by preparing you for your meeting.



10. Legal meanings

These are some of the words and terms you might encounter when making your Will.

Administrator A person appointed by law to finalise your affairs should you die without leaving a valid Will.

Beneficiary

Anyone who receives something from your Will.

Bequest (also often called a legacy)

A gift in a Will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a percentage share of what is left after all other gifts have been made) or specific (a particular item or property).

Codicil

An addition or amendment to an existing Will.

Estate

The total value of everything you own at your time of death, minus any outstanding commitments.

Executor

A person you appoint to make sure the wishes stated in your Will are carried out.

Guardian

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

Intestacy

The situation that exists if you die without a valid Will.

Probate

The formal process that determines whether your Will is valid.

Residue

The remainder of your estate after you have made all other gifts such as cash, property or specific items.

Testator (male) and Testatrix (female)

The person making the Will.

Trust

A provision you can put in your Will to treat part of your assets in a particular way after your death.