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. Complete this planner, then take it 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 | 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 |  |  |  |  |  |
| Total Assets | *£* |

What are your liabilities?

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

|  |  |
| --- | --- |
| Assets less liabilities = Total Estate Value: | £ |

|  |  |
| --- | --- |
| Your partner’s name and address:  *(only if it is different from your own)* |  |
| Children’s full names and addresses:  *(only if different from your own)* |  |
| Guardian’s full name and addresses: |  |
| Executers full name and addresses: |  |
| Specific Item Bequests:  Write down in full the name and address of all individuals and charities you want to benefit together with a brief description of the item. |  |
| Pecuniary Bequests:  Write down in full the names and addresses of all individuals and charities you want to benefit and the amount. |  |
| Residuary Bequests:  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. |  |
| What would you like to happen to your bequests if any of your beneficiaries die before you do? |  |

On a separate sheet, please list any questions you may have for your solicitor and keep it with your Will Planner in a safe place.

Important note:

* Remember this is your personal planner to take to help you prepare for your visit to your chosen solicitor
* THEREFORE, Please do not return this planner with your registration form.
* The Will Planner cannot be used as a valid Will.