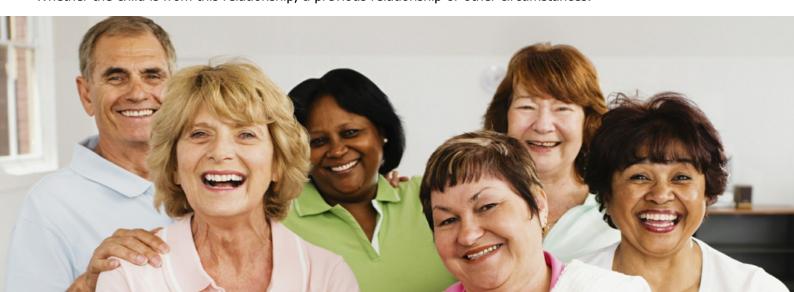
# **Will Planner**

This Will Planner is to help you prepare for questions the solicitor will ask at your appointment. Thinking about and completing these questions before your appointment 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. You					
Full Name: Date of Birth: / /					
		Post	code:		
<b>Telephone Number: Marital Status:</b> Single [	(Home) Divorced Engaged	(Mobile) Remarried  Married	Widowed Separated		
2. Your spouse or partner					
	Date Of Birth: / /				
Telephone Number: (Home)					
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 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)	£				
Other property or land	£				
Cars and other vehicles	£				
Home contents including furniture and fittings	£				
Items of particular value (e.g. jewellery or art)	£				
Money in banks and building societies	£				
Shares, investments, National Savings, Premium Bonds	£				
Insurance and pensions	£				
Other savings and assets	£				
Total Assets	£				
Your major liabilities					
Your mortgage	£				
Loans and overdrafts	£				
Credit cards	£				
Credit or hire purchase agreements	£				
Other liabilities	£				
Total Liabilities	£				
Assets less liabilities = estate value	£				

Name	Address	Descriptio
	<b>punts of money).</b> List the names a ld like to leave a specific sum of mo	
Name	Address	Amount (
	tage or all of the remainder of yo ties* to whom you would like to leave	
of individuals and chari	ties* to whom you would like to leave	e a proportion of your

\* including registered charity numbers

9. Choice of Executors		
	nt a trusted family member or friend. A solicitor can also act as an Executor but ormally 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 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.\*

Your Free Wills Month solicitor will be able answer all your questions about what should be in your Will, including any charitable gifts you choose to make.



<sup>\*</sup> Under the terms of Free Wills Month, you are not obliged to include a gift to any of the charities.

## 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 if you die without leaving a 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.

### **Inheritance Tax**

A tax levied at 40% of the value of your estate over the first £325,000. Gifts to your spouse or a charity are exempt.

## **Probate**

The process that determines whether your Will is valid.

# **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.