

This simple document is designed to help you plan for your appointment. It should help you think about what you wish to do with your estate and who will take care of any children you might have. Simply complete prior to your appointment and have it with you when discussing your will.

YOUR DETAILS

Your name and address:

Your partner's name and address

Executors full names and addresses:

Children's full names and addresses: (if different from above)

Guardians' full names and addresses:

YOUR ESTATE



A. What is the value of your major assets?

Your home (or share in it)	£ _____
Other property and land	£ _____
Cars and other vehicles	£ _____
Home contents including furniture and fittings	£ _____
Items of particular value (eg jewellery/art)	£ _____
Money in banks and building societies	£ _____
Shares, investments, national savings, premium bonds	£ _____
Insurance and pensions	£ _____
Other savings and assets	£ _____
Total of A	£ _____

B. What are your major liabilities?

Your mortgage	£ _____
Loans and overdrafts	£ _____
Your credit cards	£ _____
Credit or HP agreements	£ _____
Other liabilities	£ _____
Total of B	£ _____
A minus B = Total Estate Value	£ _____

WHO YOU WOULD LIKE TO PROVIDE FOR

Make a list of the family, friends and charities you would like to benefit in your will and think about what you would like them to receive.

You will need to decide what you would like to give each person, organisation or charity and whether it should be a specific item, amount of money or a share of your estate.

	% Share	Amount £	Specific Item

QUESTIONS YOU MAY HAVE...

As you have started planning your will you may now have some questions, note them here ready for your appointment.

THE LEGAL TERMS EXPLAINED

Administrator

Someone who is appointed by law to settle your affairs if you die with no will.

Beneficiary

Anyone who receives something from a will.

Bequest

A gift left in a will. It can be:

- Residuary – a share of whatever is left after all debts have been settled and other gifts made.
- Pecuniary – a gift of a specific sum of money.
- Specific – a gift of a particular object or property.

Codicil

An addition or amendment to an existing will.

Estate

The total value of everything you own at your death, less any outstanding debts.

Executor(s)

The person or persons you appoint to carry out the instructions in your will. An executor can be a relative, a friend or your solicitor.

Guardian(s)

The person or persons parents choose to look after their children in the event of their death.

Intestacy

The name for the situation that arises when someone dies without making a will.

Legacy

Another name for a Bequest.

Probate

The legal process to establish whether your will is valid.

Residue

The sum left from an estate when all debts, charges and gifts are deducted.

Testator (male) / Testatrix (female)

The person making the will.

Trust

An arrangement you can make in your will to administer part of your assets after your death.