

Will Planner

This Will Planner is designed to help you prepare for questions the solicitor will ask at your appointment. It 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. Please bear in mind that the Free Wills Month Charities are sponsoring your Will, and consider leaving a legacy to support their vital services in the future.

**FREE WILLS
MONTH**

helping great charities

1. You

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

Address:

.....**Postcode:**.....

Telephone Number: (Home)..... (Mobile)

Marital Status: Single ☐ Divorced ☐ Engaged ☐ Remarried ☐ Married ☐ Widowed ☐ Separated ☐

2. Your spouse or partner

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

Address:

.....**Postcode:**.....

Telephone Number: (Home)..... (Mobile)

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)	
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

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

Pecuniary 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 (£)

Residuary 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.*

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.

* 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.