



Will planner

Writing a will is naturally associated with thinking about our own death and none of us likes to do that but it's really important to have a will. A valid will enables you to decide what happens to your estate and it makes things much easier for the people you leave behind.

This will planner is aimed at helping you to gather your thoughts and to prepare the information you'll need to have your will drafted. The planner guides you through the information your solicitor will ask for and gives you the opportunity to make sure your wishes are clear and thought through.

If you're not sure about any of the questions, your solicitor will be happy to discuss them with you, taking into account your own personal circumstances.

1 You

Full name: _____

Date of birth: _____

Address: _____

_____ Postcode: _____

Telephone number: (home) _____

(mobile) _____

Email address: _____

Marital status: single/divorced/married/civil partnership/widowed/separated

(please delete as appropriate)

2 Your spouse or partner

Full name: _____

Date of birth: _____

Address: _____

_____ Postcode: _____

3 Children

Full name: _____

Address: _____

_____ Postcode: _____

Date of birth: _____

Full name: _____

Address: _____

_____ Postcode: _____

Date of birth: _____

Children (continued)

Full name: _____

Address: _____

_____ Postcode: _____

Date of birth: _____

Full name: _____

Address: _____

_____ Postcode: _____

Date of birth: _____

4 Do you have an existing will?

Yes/No (Please delete as appropriate)

Does your spouse/partner have an existing will?

Yes/No (Please delete as appropriate)

5 Nominated guardians for any child yet to reach adulthood (18 years of age)

Full name: _____

Address: _____

_____ Postcode: _____

Full name: _____

Address: _____

_____ Postcode: _____

6 Your executors

Full name: _____

Address: _____

_____ Postcode: _____

Full name: _____

Address: _____

_____ Postcode: _____

Full name: _____

Address: _____

_____ Postcode: _____

7 Your estate

Assets (approximate value if known)		Liabilities (loans, debts)	
Home and any other property or land	£	Mortgages	£
Car (or other vehicle)	£	Loans and overdrafts	£
Home contents including furniture and fittings	£	Credit cards	£
Items of particular value (e.g. jewellery, antiques)	£	Other	£
Savings in banks or building societies	£		
Shares/ investments/ premium bonds etc	£		
Insurance policies	£		
Pensions	£		
Other	£		
Total	£	Total	£

Assets – liabilities = Total estate value

Total estate value £

8 Gifts

Here is where you set out who you'd like to benefit under your will and how. You can leave a specific item, for example a valuable piece of jewellery or furniture, you can leave a fixed sum of money, or you can leave a share (or percentage) of your estate.

When you leave a share to an individual or a charity, the value of that share is calculated **after** all specific items and lump sums have been taken into account.

Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item
Name Address	% Share	Fixed amount £	Specific item

Please make a note of what you would like to happen to their gifts if any of the people listed here die before you.

Explanation of words used in or about wills

Testator – The person who makes a will.

Executor (s) – The person (s) appointed in the will by the testator to deal with the estate after his/her death.

Bequest – A gift in a will, specific, pecuniary or residuary.

Specific gift – A gift of a specific item. This could be anything from a valuable piece of jewellery or furniture, to a residential property.

Pecuniary gift – A gift of a fixed sum of money.

Residuary gift – A gift of a share (or percentage) of the testator's estate.

Restricted gift – A gift where the testator specifies in the will it must be used for a specific purpose, for example research/education/patient care.

Beneficiaries – The people or charities who benefit under the terms of a will.

Witness – The person who watches the testator sign his/her will. This person must not be a beneficiary in the will, nor be married to a beneficiary in the will.

Codicil – A legal document, signed and witnessed in the same way as a will, that can be used to alter an existing will.

Estate – The assets owned by a deceased person, including property, cash, savings and personal effects. Usually calculated after any bills, debts and/or expenses relating to the funeral or the will have been taken into account.

Inheritance tax

The tax which may be payable on your estate after all allowances have been taken into account. Any tax due will be determined by the value of the assets you leave and to whom. Gifts to charity are, in most instances free from inheritance tax. Your solicitor will be able to advise you further, given your own personal circumstances.