

Will planner

A handy tool to prepare you for meeting with your solicitor

Before meeting with your solicitor, it's a good idea to plan what you want to include and who you want to benefit. You can use this form to gather your thoughts and plans in one place for easy reference at your meeting. (Please note that this will planner is not a legal document and cannot be used as a valid will.)

1. Note down important contact details below

Your full name:

Address:

.....

..... Telephone:

Your partner's full name:

Address (if different):

.....

Your children's full names and addresses:

.....

.....

.....

.....

If you have children who are under 18, who would you like to be their guardian*?:

.....

Executors** full names and addresses:

.....

.....

.....

*Guardians have legal responsibility for children until they turn 18.

**Executors are the people who will deal with your estate, collecting and distributing money and property after your death. You can choose up to four executors (usually a family member or a solicitor). Write their details here and let them know where copies of your will are kept.

2. Work out how much your estate is worth

List all your assets (what you own) and liabilities (what you owe) below. Then add together everything you own and subtract everything you owe to work out what your estate is worth.

Assets	Value	Liabilities	Value
Home	£	Mortgage	£
Other property or land	£	Loans/overdrafts	£
Car (or other vehicle)	£	Credit cards	£
Home contents including furniture and fittings	£	Other debts	£
Items of particular value (e.g. jewellery, antiques)	£		£
Savings in banks and building societies	£		£
Investments, Shares, Premium bonds etc.	£		£
Insurance policies	£		£
Pensions	£		£
Other savings and assets	£		£
Total A	£	Total B	£
Total A – Total B = Total estate value		£	

3. Decide what you would like to leave to whom

You will need to decide which gifts will go to whom in your will. You can give a specific item (e.g. a family heirloom), a fixed cash amount, or a percentage of your estate (calculated when all other costs and gifts have been taken into account).

Name and address	% Share	Fixed amount	Specific item
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		

If any of the people you mention do not survive you, what would you like to happen to their gifts?

.....

.....

.....

.....

