

## 10 Your estate

Assets (approximate value if known)		Liabilities (loans, debts)		Tick when complete
Home and any other property or land	£	Mortgages	£	
Savings in banks or building societies	£	Loans and overdrafts	£	
Home contents including furniture and fittings	£	Credit cards	£	
Items of particular value (e.g. jewellery, antiques)	£	Other	£	
<b>TOTAL</b>	<b>£</b>	<b>TOTAL</b>	<b>£</b>	
<b>Total Estate Value: £</b>		(Your 'Total Estate Value' equals your Assets minus your Liabilities)		

## 11 Your gifts

Use this section to plan who you would like to be a beneficiary of your Will. You will need to decide what you would like to give each person or charity named in your Will. You can give a specific item, for example, a family heirloom, a fixed cash amount or a percentage or share of your estate.

Name and Address	% Share	Fixed Amount £	Specific item	Tick when complete
If any of these people do not survive you, what should to happen to their gifts?				



Your legacy,  
*our promise*

## Your Will Planner

We have created this straightforward Will Planner to assist you in preparing for the questions your solicitor will ask during your meeting to draft your Will. Reflecting on and capturing your answers beforehand, ensures your wishes will be clearly articulated. This preparation will also save time for both you and your solicitor, facilitating a smoother and more efficient Will-writing process.

Please note that this Planner is **not** your Will. Instead, you will use your responses to these questions to create your Will with your solicitor. If you are uncertain about any of the questions listed, your solicitor will be happy to discuss them with you.

### 1 Your details

Full Name:	Tick when complete
Date of Birth:	
Address:	Tick when complete
Postcode:	
Telephone Number: (Home)	Tick when complete
Mobile Number:	
Marital Status: Single/Divorced/Married/Widowed/Separated/Civil Partnership (Please delete as appropriate)	Tick when complete

### 2 Do you have an existing Will?

<input type="checkbox"/> Yes <input type="checkbox"/> No	Tick when complete

### 3 Does your spouse/partner have an existing Will?

<input type="checkbox"/> Yes <input type="checkbox"/> No	Tick when complete

### 4 Your spouse or partner

Full Name:	Tick when complete
Date of Birth:	
Address:	Tick when complete
Postcode:	

**5 Your children** (use a separate piece of paper to list more children)

Tick when complete

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	

**6 Your stepchildren** (use a separate piece of paper to list more stepchildren)

Tick when complete

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	

**7 Pet provisions**

Tick when complete

Name of pet(s):	
Wishes for pet(s):	
Gifts to pet(s)/or gift for care etc:	
Name of person(s) responsible for pet(s):	
Address of person(s) responsible for pet(s):	
Postcode:	

**8 Funeral arrangements**

Tick when complete

<input type="checkbox"/> Burial <input type="checkbox"/> Crematation <input type="checkbox"/> Eco-burial <input type="checkbox"/> Don't mind	
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<input type="checkbox"/> Where are your funeral wishes stored?	
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**9 Your executors**

Tick when complete

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	

Full Name:	
Date of Birth:	
Address:	
Postcode:	