



# 4

## What have I got to leave?

## Is this item jointly owned?

		Yes	No
If you own your home how much is it worth?	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Other properties or land?	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Vehicles	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Home contents (including furniture, electrical etc)	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Have you any savings or investments?	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Valuables	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
		Yes	No
Jewellery	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Insurance/Pensions/Savings	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Premium Bonds, etc	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Bank Accounts	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
Miscellaneous assets	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>	<b>£ _____</b>		

## What are my liabilities?

## Is this a joint responsibility?

		Yes	No
Mortgage	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
	_____		
Loans/Overdrafts	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
	_____		
Any credit or extended purchase agreements	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
	_____		
Other	£ _____	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>	<b>£ _____</b>		

To calculate the estimated current value of your estate take your *total assets less total liabilities*.

£ \_\_\_\_\_



# 7

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

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# 8

If your children are under 18, who you would like the guardians to be?

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# 9

The names of those you would like to manage your affairs when you have gone (your Executors). These can be legal professionals, friends or family member or a mixture- usually two people.

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# 10

Funeral instructions or any other questions you would like to ask your professional adviser

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