## 10 steps to consider when planning a will

This document contains step-by-step points for you to consider when planning a will. It may be helpful for you to read through and fill in the following information, before meeting your solicitor or professional advisor.

1				
Your Name Your Address		- - -		
Postcode		-		
Complete Section	ons 2 and 3 as appropriate.			
2				
Your partner/spo	ouse's details:			
Name Address (if diffe	rent)	-		
Postcode		- - -		
3				
Children(s) full	names and address(es)		Are any children Yes	of the under 18?
			_ 🗆	
			_ 🗆	
			_ 🗆	
			_ 🗆	

What have I got to leave?			Is this item jointly owned?		
If you own your home how much is it worth? Other properties or land? Vehicles Home contents (including furniture, electrical etc.) Have you any savings or investments? Valuables		£ £ £ £		_	No  □  □  □  □  □  □
				Yes	No
	Jewellery Insurance/Pensions/Sa Premium Bonds, etc Bank Accounts Miscellaneous assets	£ £		[] [] []	
	Total	£			
What are my liabilitie	<u>s?</u>	<u>Is</u>	this a joint re	esponsibi Yes	ility? No
Mortgage		£			
Loans/Overdrafts		£		 	
Any credit or extended	purchase agreements				
Other		£			
Total		£			
To calculate the estima <i>liabilities</i> .	ted current value of your	estate take yo	ur <i>total asset</i>	s less tot	al
		£		_	

## **Gifts**

Who would you like to benefit from your estate? What would like to leave them? An exact amount of money or certain items?

Name	Address	Item/Amount

Are there any charities that you would like to give a gift to?

Charity Name	Charity Address	Registered Charity Number	Amount



## Remainder of your estate

Here you can list people and/or charities you would like to share what is left of your estate after all the individual gifts have been made.

Name	Address	Proportion	Registered Charity Number