

Wills Planner

Use this planner to collect the relevant information you will need to make writing your will as quick and simple as possible.

Partner's details (if applicable)

Full legal name and address

Children's details

Full legal names and addresses (if different from your own)

Executors' details (be sure that the people you have in mind are happy to be your executors before you start your will)

Full legal names and addresses

Trustee details (be sure that the people you have in mind are happy to be your trustees before you start your will)

Full legal names and addresses

Guardians' details (be sure that the people you have in mind are happy to be your guardians before you start your will)

Full legal names and addresses

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Value of your estate

Major Assets

House/property (or your share)

£

Bank/Building Society accounts

£

Savings, shares and investments

£

Insurance and pensions

£

Personal possessions (e.g. jewellery, furniture, vehicles)

£

Other savings and assets

£

Total assets:

£

Major Liabilities

Mortgage

£

Loans, overdrafts and credit cards

£

Other liabilities

£

Total liabilities:

£

Total estate value (total assets minus total liabilities):

£

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Bequest - Gifts for beneficiaries

1. Specific Gifts - gifts of items

Examples: giving your jewellery to your daughter or your golf clubs to your nephew.

Full legal names and addresses of beneficiaries.

2. Pecuniary Gifts - gifts of money

Examples: giving £100 to each of your godchildren or £1000 to your favourite charity.

Full legal names and addresses of beneficiaries.

3. Residuary Estate

Full legal names and addresses of those you wish to leave what is left of your estate, after all the debts, specific requests and legacies have been paid.