

# Your Will Planner



We've put together this simple Will Planner to help you prepare for questions your solicitor will ask you when you meet to write your Will. Thinking about and setting out your answers in advance will give you time to make sure your wishes are clear. It will also help to save you and your solicitor time, and help to make sure the Will writing process runs smoothly.

**This Planner is not your Will.** You will use the answers to these questions to draw up your Will with your solicitor. If you are unsure about any of the questions listed here, your solicitor will be happy to discuss them with you.

## 1 Your details

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

Telephone Number: (Home) ..... (Mobile) .....

Marital Status: Single / Divorced / Married / Widowed / Separated (Please delete as appropriate)

2 Do you have an existing Will?  Yes  No

3 Does your spouse/partner have an existing Will?  Yes  No

## 4 Your spouse or partner

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

## 5 Your children

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

## 6 Your Executors

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

Full Name: ..... Date of birth: .....

Address: .....

..... Postcode: .....

## 7 Your Estate

Assets (approximate value if known)		Liabilities (loans, debts)	
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>TOTAL</b>	£

**Total Estate Value: £**

(Your 'Total Estate Value' equals your Assets minus your Liabilities)

## 8 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
Name and Address	% Share	Fixed Amount £	Specific item
Name and Address	% Share	Fixed Amount £	Specific item
Name and Address	% Share	Fixed Amount £	Specific item

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

