

## 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 (this is known as a specific bequest), you can give a fixed cash amount (a pecuniary bequest) or a percentage of your estate (a residuary bequest) calculated after specific bequests and pecuniary bequests have been taken into account.

Name	Address	% share	Fixed amount £	Specific item
Age UK Berkshire (registered charity number 1146462)	EXAMPLE	EXAMPLE	EXAMPLE	EXAMPLE
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	

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

.....

.....

.....

.....

Age UK Berkshire, Huntley House  
119 London Street  
Reading  
RG1 4QA  
0118 959 4242  
www.ageukberkshire.org.uk

# Will planner

A handy tool to prepare  
for your solicitor's meeting

Before meeting with your solicitor to make a will it's a good idea to plan what you want to include and who you want to benefit. Once you have remembered family and friends you may decide you'd like to leave a legacy to a charity that is important to you.

It's a wonderful way to carry on making an impact on a cause you believe in after you've gone. If you'd like to find out about remembering Age UK Berkshire in your will, please contact our Chief Executive on **0118 959 4242** or email [info@ageukberkshire.org.uk](mailto:info@ageukberkshire.org.uk)

You can use this form to gather all of your thoughts and plans in one place for easy reference at your meeting. (Please note that this Will Planner is not a legal document, but a form to take you through some of the key questions that you need to consider.)

## You and your family

Name:

.....

Address:

.....

.....

.....

.....

Telephone:

.....

Your partner's name and address:

.....  
.....  
.....  
.....  
.....

Children's full names and addresses:

.....  
.....  
.....  
.....  
.....  
.....  
.....

If you have children who are under 18, who would you like to be their guardian (with legal responsibility for them until they turn 18)?

.....  
.....  
.....  
.....  
.....  
.....  
.....

Executors' full names and addresses:

.....  
.....  
.....  
.....  
.....  
.....  
.....

**Funeral instructions**

Let your executors know your wishes for your funeral (e.g. whether you'd like to be buried or cremated; whether you'd prefer a collection for charity instead of flowers).

.....  
.....  
.....  
.....

On a separate sheet of paper, make a list of any questions that you may want to ask your solicitor and keep it with this planner. Please note that this Will Planner cannot be used as a valid will.

**Your estate**

Use this section to calculate how much your estate is worth.

Assets	Value	Liabilities	Value
Home and any other property or land	£	Mortgages	£
Car (or other vehicle)	£	Loans and overdrafts	£
Home contents, including furniture and fittings	£	Credit cards	£
Items of particular value (e.g. jewellery, antiques)	£	Other	£
Savings in banks and building societies	£		
Shares/investments/Premium Bonds, etc.	£		
Insurance policies	£		
Pensions	£		
Other	£		
Total	£	Total	£
<b>Assets – Liabilities = Total Estate Value</b>	<b>£</b>		