

Will planner

A handy tool to prepare for meeting with your solicitor

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 to leave a gift in your will 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 would like to find out more about how a gift in your will could make a difference to the lives of older people, please contact the legacy team by calling, 0117 929 7537, or emailing, fundraising@ageukbristol.org.uk.

You can use this form to gather 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:.....

.....

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

Telephone:.....

Your partner's name and address:

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Your children's full names and addresses:

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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)?

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Executors' full names and addresses:

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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).

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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	£
Assets - Liabilities = Total Estate Value	£		

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 Bristol (registered charity number 1062548)	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?

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