

Will planner



A handy tool to prepare you 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. 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 and cannot be used as a valid will. It is a form to take you through some of the key questions that you need to consider.

You and your family

Your full name: _____

Address: _____

_____ Postcode: _____

Telephone: _____

Your partner's full name and address:

Your 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)?

Your Estate

Work out how much your estate is worth.

List all your assets (what you own) and liabilities (what you owe) below. Then add together everything you own and subtract everything you owe to work out what your estate is worth.

Assets	Value	Liabilities	Value
Home	£	Mortgage	£
Other property or land	£	Loans/overdrafts	£
Car (or other vehicle)	£	Credit cards	£
Home contents including furniture and fittings	£	Other debts	£
Items of particular value (e.g. jewellery, antiques)	£		£
Savings in banks and building societies	£		£
Investments, Shares, Premium bonds etc.	£		£
Insurance policies	£		£
Pensions	£		£
Other savings and assets	£		£
Total A	£	Total B	£
Total A – Total B = Total estate value		£	

Executors'* full names and addresses:

Gifts

Decide what you would like to leave to whom.

You will need to decide which gifts will go to whom in your will. You can give a specific item (e.g. a family heirloom), a fixed cash amount, or a percentage of your estate (calculated when all other costs and gifts have been taken into account).

Name and address	% Share	Fixed amount	Specific item
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	

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

*Executors are the people who will deal with your estate, collecting and distributing money and property after your death. You can choose up to four executors (usually a family member or a solicitor). Write their details here and let them know where copies of your will are kept.

Funeral instructions

Write instructions for your funeral to help your loved ones to respect your wishes.

In your will, you may wish to include any particular wishes for your funeral or memorial service, such as whether you want to be buried or cremated, and where you'd like the service to be held.

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.

Gifts in wills play a vital role in helping us make a lasting difference to older people who need our help. If you would like to remember **Age UK Hammersmith & Fulham** in your will, please pass the details below to your solicitor:

Age UK Hammersmith & Fulham, 105 Greyhound Road, London, W6 8NJ
Registered charity number: 1128267

Should you wish to contact us:
Reception **020 7386 9085** Email info@ageukhf.org.uk
www.ageuk.org.uk/hammersmithandfulham/

