

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 Suffolk (Registered charity number 1085900)	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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Age UK Suffolk
 14 Hillview Business Park
 Old Ipswich Road
 Claydon, Suffolk IP8 4LE
01473 298688
www.ageuksuffolk.org

Will planner

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 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.

If you would like to support **Age UK Suffolk** in your will please contact our Legacy Officer on **01473 298688** or email fundraising@ageuksuffolk.org

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:

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Address:

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Telephone:

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Your partner's name and address:

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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	£		