

Cystic

Fibrosis why we believe in a better future

Planning your will – 10 easy steps

Before you visit a solicitor, it's a good idea to plan what you want to include in your will and who you want to benefit. Use this checklist to write down relevant information and take it with you when you visit your solicitor.

1.

Your full name _____

Address _____

Postcode _____ Date of birth _____

2.

Your partner/spouse's details:

Name _____

Address (if different) _____

Postcode _____ Date of birth _____

3.

Child(ren)'s full name(s), address(es) and date(s) of birth, including children from previous marriages.

Child(rens) full name(s)	Address(es)	Date(s) of birth

4.

What do you own (assets)

If you own your home, how much is it worth? £ _____
 Other properties or land? £ _____
 Vehicles £ _____
 Home contents (furniture, electrical etc) £ _____
 Valuables (jewellery etc) £ _____
 Insurance/pensions/savings or investments £ _____
 Bank accounts £ _____
 Miscellaneous assets £ _____

 Total assets £ _____

Is this item jointly owned?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

What do you owe (liabilities)

Mortgage £ _____
 Loans/overdrafts £ _____
 Other credit or extended purchase agreements £ _____
 Total liabilities £ _____

Is this a joint responsibility?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Estate value (total assets less total liabilities) £ _____

5.

Gifts

Who would you like to benefit from your estate? What would you like to leave them?
 A percentage of your estate, an exact amount of money or certain items?

Name	Address	Percentage/amount/gift details

Are there any charities you would like to give a gift to?

Name	Address	Reg Charity number	Percentage/amount/gift details

6.

Remainder of your estate

After all the individual gifts have been made, you can list people and/or charities that you would like to share what is left of your estate. This kind of gift is more likely to keep pace with inflation.

Name	Address	Proportion	Reg Charity number

7.

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

8.

If your child(ren) are under 18 (16 in Scotland), who would you like to be their guardian? This person will be responsible for your child(ren)'s upkeep if you die before they have reached the age of 18 (16 in Scotland) and if both parents are dead.

9.

Your executors – the names and addresses of those you would like to manage your affairs when you have gone. It is usual to select two people. These can be legal professionals, friends, family or a mixture, and can also be beneficiaries.

10.

Funeral instructions – let your executors know your wishes for your funeral, for example, whether you'd like to be buried or cremated. You may also suggest donations be made to a charity instead of flowers at your funeral.
