



# Preparing

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to visit your solicitor

This form helps you think through the wishes you want expressed in your will. Complete as much as you can before you visit your solicitor. Please write clearly in BLOCK CAPITALS as someone will need to transcribe most of this information into the will, and try to include full names and addresses. If you have previously made a will or added a codicil please take it with you when you visit a solicitor.

## 1. Your details

Your full name:

Your address and postcode:

Phone:

## 2. Value your assets

Category	Main items	Approx value
Property	Your home	£
	Additional property or land	£
Contents	Furniture & fittings, electrical goods etc	£
Valuables	e.g. Jewellery, Art, Antiques etc	£
Savings and Investments	Savings in Bank and/or Building Societies	£
	Shares, Investments and ISAs	£
	National Savings, Premium Bonds	£
Insurance and Pensions	Life Insurance, Endowments, Pensions etc	£
Other Assets		£

	<b>TOTAL ASSETS</b>	£
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### 3. Liabilities: What you owe

Category	Main items	Approx value
Property	Mortgage	£
Loans	Loans outstanding	£
Credit	Outstanding credit card balances, HP and credit agreements	£
Bank Investments	Bank overdraft	£
Other Liabilities		£
	<b>TOTAL LIABILITIES</b>	<b>£</b>

<b>NET ASSETS</b>	Total Assets minus Total Liabilities	<b>£</b>
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Note : Remember to split the value of any joint assets or liabilities.

### 4. Your executors

Normally one or two, maximum four. Often includes one well-organized local younger family member or friend. You can include your solicitor, bank or accountant, but your estate will be charged for their professional work. Ensure that at least one of your executors is likely to survive you.

Full name	Address and Telephone

## 5. Specific gifts or legacies

Specific items (e.g. heirlooms, paintings, jewellery) that you want to leave to family, friends or charities. Describe them in some detail to avoid future misunderstandings.

Item description	Who it is given to, address and telephone

## 6. Gifts of Money

Please list any set sums of money you may wish to leave to people and/or to your parish or charities. These are called *pecuniary legacies*.

Amount	Who it is given to, address and telephone

## 7. Sharing the remainder of your estate

List the people and/or parish or charities that you would like to share the remainder or residue of your estate once all of the above legacies have been made. These gifts are called *residuary legacies*.

Proportion of Residue %	Who it is given to, Address and Telephone

## 8. Young children

Do you have dependent children? It is advisable to appoint a guardian to look after them until they are at least 18 years old. You should ask for the potential guardian's agreement before appointing them.

Guardian's name:

Address and postcode:

Phone:

## 9. Other instructions and requests for executors

Sometimes it may be sensible to write a side letter to your executors setting out your non-binding preferences. The letter should be stored with your formal will, but not attached to it.

**Questions for your solicitor or other professional advisers**