



WILL PLANNER

Use this planner to record key information in preparation for writing your Will. Your list of assets and liabilities can also be used to work out how much Inheritance Tax may be owed on your estate. You can then work with a solicitor to find out if there may be ways you can reduce this.

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The value of your estate

Your assets

Home £.....

Any other property or land £.....

Car £.....

Home contents £.....

Money in banks and building societies £.....

Pensions £.....

Shares or investments £.....

Life insurance £.....

Death in service benefit £.....

Total value of assets £.....

Your liabilities

Mortgage £.....

Loans £.....

Overdrafts £.....

Credit card debts £.....

Other liabilities £.....

Total value of liabilities £.....

Estimated value of estate:

Potential value of Inheritance Tax owed:

Your Executors

Your executors should be people you trust. Be sure to ask them before appointing them.

Executor 1

Name:

Address:

.....

Executor 2

Name:

Address:

.....

Executor 3

Name:

Address:

.....

Executor 4

Name:

Address:

.....

Your bequests

Use the boxes below to think about the gifts you'd like to leave and how you'd like to divide your estate. You may like to consider whether there are any charities you'd like to support once your family and friends are taken care of.

List any **specific items** here, along with who you'd like to leave them to:

[illegible]

Are there any **pecuniary gifts** (specific amounts of money) that you'd like to leave to people or charities? List them here.

[illegible]

Who would you like to receive the **residue** of your estate? This can be left to one individual or split into shares.

Percentage share	Name of beneficiary
.....	
.....	
.....	
.....	
.....	
.....	
.....	
.....	

If you’ve listed any charities above, you will need to include their name, address and registered charity number in the Will. Use the space below to record this information.

Charity name	Address	Registered charity number
.....		
.....		
.....		
.....		
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.....		
.....		
.....		

This booklet is for information only. Always seek legal advice for any questions or concerns surrounding these issues.