



To ensure you get the most from meeting with your solicitor when discussing your will, we have put together a checklist. It's important you gather your thoughts and have an idea of whom you'd like to benefit in your Will. This guide can be used as a reference in your meeting, but please note it is NOT a legal document and is not a substitute for a valid Will.

**1. Note down important contact details below** (Please print in black biro and block capitals)

**Full Name**

**Address**

  
  

**Postcode**

**Contact Telephone Number**

**Partners Full Name**

**Address (if different)**

  
  

**Postcode**

**Contact Telephone Number**

**Your children's full names and addresses**

**Child 1**

**Address**

  
  

**Postcode**

**Contact Telephone Number**

**Child 2**

**Address (if different)**

  
  

**Postcode**

**Contact Telephone Number**

\*Guardians have legal responsibility for children until they turn 18. \*\*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.

**Your children's full names and addresses (continued)****Child 3**

Address

  
  

Postcode

Contact Telephone Number

**Child 4**

Address

  
  

Postcode

Contact Telephone Number

**Child 5**

Address

  
  

Postcode

Contact Telephone Number

**Child 6**

Address

  
  

Postcode

Contact Telephone Number

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**If you have children who are under 18, who would you like to be their guardian\*?:****Full Name****Executors\*\* full names and addresses: (you are allowed up to 4 executors)****Executor 1****Address**  
  
**Postcode****Contact Telephone Number****Executor 2****Address**  
  
**Postcode****Contact Telephone Number****Executor 3****Address**  
  
**Postcode****Contact Telephone Number****Executor 4****Address**  
  
**Postcode****Contact Telephone Number**

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## 2. Work out how much your estate is worth

Write below all your assets (this is what you own) and liabilities (this is what you owe) Add them up and subtract your total liabilities from your assets and the figure is what your estate is worth.

<b>Assets</b>	<b>Value</b>	<b>Liabilities</b>	<b>Value</b>
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	£		£
<b>TOTAL A</b>	£	<b>TOTAL B</b>	£
<b>TOTAL A – TOTAL B = TOTAL ESTATE VALUE</b>		£	

### 3. Deciding what you'd like to leave and to whom

You'll need to decided who is receiving what in your will. It could be a specific item, like jewellery or an heirloom, a fixed amount of cash or a percentage of your estate. Fill in the form below

Name and address	% Share	Fixed Amount	Specific Item
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		



