



Will Planner

A HANDY FORM TO PREPARE YOURSELF FOR MEETING WITH YOUR SOLICITOR

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.

Assets	Value	Liabilities	Value
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	£		£
TOTAL A	£	TOTAL B	£
TOTAL A – TOTAL B = TOTAL ESTATE VALUE		£	

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

You'll need to decide 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
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		
	% £		

If any of the people you mention do not survive you, what would you like to happen to their gifts?

4. Your Funeral Wishes

If you'd like any specific requests for your funeral or memorial service (buried or cremated, which music or readings to be included) please make a note here

5. Note down any questions you have for your solicitor below

Any gift left in your will to Hourglass will provide vital support, information and advice to older people at risk or suffering form abuse. Please pass our details below onto your solicitor

HOURGLASS (Safer Ageing) Ltd,
Office 8,
Unit 5 Stour Valley Business Centre,
Brundon Lane, Sudbury,
Suffolk, CO10 7GB.

Hourglass is the working name of Hourglass (Safer Ageing), a charity registered in England and Wales (reg. no: 1140543), and also in Scotland (reg. no: SC046278). Hourglass (Safer Ageing) is registered as a company in England and Wales under number 07290092.