

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.

	below (Please print in black biro and block capitals)
Full Name	Partners Full Name
Address	Address (if different)
Postcode	Postcode
Contact Telephone Number	Contact Telephone Number
Your children's full names and addresse	
Child 1	Child 2
Child 1	Child 2
Child 1 Address	
	Child 2
	Child 2
Address	Child 2 Address (if different)
	Child 2
Address Postcode	Child 2 Address (if different) Postcode
Address	Child 2 Address (if different)

^{*}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	Child 4	
Address	Address	
Postcode	Postcode	
Contact Telephone Number	Contact Telephone Number	
Child 5	Child 6	
Address	Address	
Postcode	Postcode	
Contact Telephone Number	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.



	8, who would you like to be their guardian*?:
Full Name	
Executors'** full names and addresse	es: (you are allowed up to 4 executors)
Executor 1	Executor 2
Address	Address
Postcode	Postcode
Contact Tolophone Number	Contact Tolophone Number
Contact Telephone Number	Contact Telephone Number
Executor 3	Executor 4
Address	Address
Postcodo	Postcodo
Postcode	Postcode
Contact Telephone Number	Contact Telephone Number
Contact Totophone Number	Contact Totophone Number

www.wearehourglass.org

3

^{*}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.



2. Work out how much your estate is worth

Write below all your assets (this is what you own) and liabilities (this is what your 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 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
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	



If any of the people you mention do not survive you, what would you like to happen to their gifts?	
4. Your Funeral Wishes	
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,

Mayflower Hall, Hall Street, Long Melford, Suffolk, CO10 9JT

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