

Checklist for Making a Gift in your Will

This form has no legal standing and cannot replace a valid Will, it is simply an aid to preparing to visit a professional to make your Will

If you have an existing Will do take it with you.

1 Your Details

Your full name	
Your current address	
Postcode	
Telephone Number	
e-mail	

2 Your Assets (snapshot of position today)

Assets	Value in £'s	Liabilities	Value in £'s
Your home		Your mortgage	
Additional property or land		Overdrafts and loans	
Home contents		Credit or HP agreements	
Cars + vehicles		Other	
Items of individual value Eg jewellery, art, antiques			
Savings in banks/building socs			
Insurance and pensions			
National Savings Premium Bonds			
Other Assets			
TOTAL		TOTAL	
Estimated Value of estate			

3. Specific Items (Special items of value or sentimental meaning)

Item:
Description & Location of item:
Beneficiary's Full Name:
Beneficiary's Address:

Postcode
Tel No:

Item:
Description & Location of item:
Beneficiary's Full Name:
Beneficiary's Address:
Postcode
Tel No:

Item:
Description & Location of item:
Beneficiary's Full Name:
Beneficiary's Address:
Postcode
Tel No:

Item:
Description & Location of item:
Beneficiary's Full Name:
Beneficiary's Address:
Postcode
Tel No:

Item:
Description & Location of item:
Beneficiary's Full Name:
Beneficiary's Address:
Postcode
Tel No:

4. Gifts of actual amounts

In apportioning cash there are two options; to state an actual amount or to give a percentage or proportion

Gift of £	<i>amount</i>
Gift to Full Name	
Address	
Postcode	
Telephone Number	

Gift of £	<i>amount</i>
Gift to Full Name	
Address	
Postcode	
Telephone Number	

Gift of £	<i>amount</i>
Gift to Full Name	
Address	
Postcode	
Telephone Number	

5. Sharing the remainder

Percentage of remainder to be gifted
Name of Individual /Charity
Registered Charity No
Full Address
Postcode

Percentage of remainder to be gifted
Name of Individual /Charity
Registered Charity No
Full Address
Postcode

6. Your executors

These should be people who are willing and able to pay your outstanding bills, deal with selling property and preparing accounts and ensure your wishes are carried out. It is usual to select two executors and it can be up to four. Many people name their solicitor as one, however, there is usually a charge for this service.

Full name:	Full name:
Address	Address
Postcode	Postcode
Tel:	Tel;

Full name:	Full name:
Address	Address
Postcode	Postcode
Tel:	Tel;

7. Special instructions for your executors

(Do you have any preference of the style of funeral they will arrange, do you want to be cremated or buried, are you happy to donate your organs to benefit others , arrangements for the care of your pet(s) etc)

Specific details of music or readings would not normally be included in your Will be should be noted and kept with your papers

8. Do you have children?

It is advisable to appoint a guardian until they are 18 years old

Guardian's Name
Address
Postcode
Tel

9. Do you have any questions to ask your solicitor?
