

Preparing to visit your solicitor

This simple checklist will help you to assess the value of your estate. It also helps you think through the wishes you would like your solicitor to put in your will.

1. My assets and Liabilities

Everything I own (assets)

House (present value)	£
Land or other property	£
Car	£
Furniture	£
Other household effects	£
Jewellery	£
Bank account(s) current total balance	£
Post Office account (s) current total balance	£
National Savings certificates and Premium Bonds	£
Stocks, shares, bonds, unit and investment trusts	£
Life assurance policies	£
Pension death benefits	£
Other savings and cash	£
Anything else of value	£
TOTAL ASSETS	£

Everything I owe (liabilities)

Mortgage (current outstanding balance)	£
Bank loans	£
Overdraft	£
Hire purchase agreements	£
Credit card debts	£
Other debts	£
Tax due	£
Any other liabilities	£
TOTAL LIABILITIES	£

TOTAL ASSETS	£
Less TOTAL LIABILITIES	£
TOTAL VALUE OF MY ESTATE	£

2. A note of any money owed to me and by whom?

<i>Name</i>	<i>Amount</i>
	£
	£
	£

3. All the gifts / items I would like to leave and the names and addresses of the persons / charities to whom I wish to leave them

To leave a share of your estate (Residuary Bequest)

<i>%</i>	<i>Name of beneficiary</i>	<i>Address</i>

To leave a fixed sum of money (Pecuniary Bequest)

<i>Amount</i>	<i>Name of beneficiary</i>	<i>Address</i>

To leave a specific item (Specific Bequest)

<i>Item</i>	<i>Name of beneficiary</i>	<i>Address</i>

4. A note of any property or possessions held jointly with someone else

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5. The names and addresses of the people I would like to be my executors:

<i>Name</i>	<i>Address</i>

6. The name and addresses of the people I would like to be legal guardians of my children:

<i>Name</i>	<i>Address</i>

7. Details of my previous will (if applicable)

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8. Questions I would like to ask:

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After you have made a will

- Keep it somewhere safe and make sure your executors know where it is
- We recommend you review your will every 5 years or whenever your personal or financial circumstances change. If you need to change your will, we recommend you contact your solicitor.