

WILL PLANNER

Prepare for your meeting with your local Will Aid solicitor by completing this Will Planner and taking it along with you



YOUR PERSONAL DETAILS

Your name and address:

Your partner's name and address: (if different from your own)

Executors** full names and addresses:

Children's full names and addresses: (if different from your own)

Guardians** full names and addresses:

*see definitions of legal terms on the back page of this Will Planner

VALUE OF YOUR ESTATE

Use these tables to help work out the value of your estate

WHAT IS THE VALUE OF YOUR MAJOR ASSETS?

Your home (or share in it)	£ <input type="text"/>
Other property or land	£ <input type="text"/>
Cars and other vehicles	£ <input type="text"/>
Home contents including furniture and fittings	£ <input type="text"/>
Items of particular value (e.g. jewellery or art)	£ <input type="text"/>
Money in banks and building societies	£ <input type="text"/>
Shares/Investments/National Savings/Premium Bonds	£ <input type="text"/>
Insurance and pensions	£ <input type="text"/>
Other savings and assets	£ <input type="text"/>
Total assets:	£ <input type="text"/>

WHAT ARE YOUR MAJOR LIABILITIES?

Your mortgage	£ <input type="text"/>
Loans and overdrafts	£ <input type="text"/>
Your credit cards	£ <input type="text"/>
Credit or HP agreements	£ <input type="text"/>
Other liabilities	£ <input type="text"/>
Total liabilities	£ <input type="text"/>

Assets less liabilities = Total Estate Value

£

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BEQUESTS

Make a note of any specific gifts you want to leave

Specific Bequests (item): Write down the full names and addresses of all individuals and charities (with registered charity numbers) you want to benefit, with a brief description of the item.

Pecuniary Bequests (set amount of money): Write down in full the names and addresses of all individuals and charities (with registered charity numbers) you want to benefit and the amount.

Residuary Bequests (a percentage or all of the residue of your estate): Write down the full names and addresses of all individuals and charities (with registered charity numbers), with their proportion of the residue of your estate.

What do you want to happen to your bequests if any of your beneficiaries die before you do?

On a separate sheet, please list any questions you may have for your solicitor and keep it with your Will Planner in a safe place. Note: this Will Planner cannot be used as a valid Will.

GIFTS TO CHARITY

Could you consider leaving a gift in your Will to charity?

When making or amending a Will, many people like to take the opportunity to include a gift to one or more of their favourite charities. This is a wonderful way to leave a lasting legacy to a cause close to your heart.

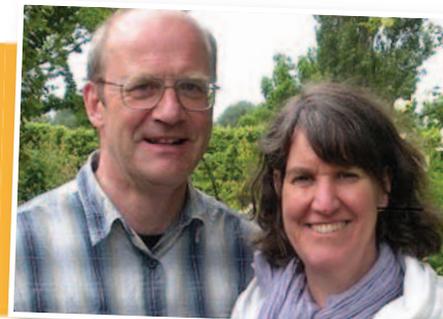
Even a small percentage of your estate can achieve so much for the charity of your choice. Leaving a gift of £1,600 could recruit and train a new Childline Counsellor who could help 200 children each year through their worries and distress. A gift of £3,000 could protect a whole community from life-threatening dengue fever by providing mosquito nets and health care training.

Gifts of this kind – known as legacies – are enormously important to charities. For the charities that make up Will Aid, for example, legacies represent up to 50% of their annual income. Without these legacies many charities simply would not be able to continue their work.

So before you meet your Will Aid solicitor, do think about which charity or charities you might like to include in your Will. They will then be able to guide you on the exact wording.

"Since the rest of our family are well provided for and we've always supported charities, it's a great choice to continue to support them if the worst happens."

Jeremy Townhill



LEGAL TERMS

Glossary of words you might need to know when making your Will:

An Administrator

is someone who is appointed by law to settle your affairs if you die with no Will.

A Beneficiary

is anyone who receives something from a Will.

A Bequest (Legacy)

is a gift left in a Will. It can be:

- *Specific*: a definite object or property
- *Pecuniary*: a gift of a particular sum of money
- *Residuary*: a gift of money or assets left when other legacies and expenses have been paid. It is normally expressed as a part or percentage of the residue of your estate.

A Codicil

is an addition or amendment to an existing Will.

Your Estate

is the total value of everything you own at your death, less any outstanding commitments.

An Executor

is the person or people you choose to make your Will happen. They can be a relative, a friend or your solicitor.

Guardians

are the people chosen by parents to look after their children in the event of their death.

Intestacy

is the name for the situation which arises when someone dies without making a Will.

Inheritance Tax

is a 40% tax deducted from estates with a value of more than £325,000. Money left to your spouse or a charity is not taxed. If your spouse pre-deceased you and did not use up their full inheritance tax free allowance, this will be added to your own at the rate prevailing at your death.

Probate

is the legal process to establish whether your Will is valid. If not, an administrator is appointed.

A Testator/Testatrix

is the person making the Will.

A Trust

is an arrangement you can make in your Will to administer part of your assets after your death.

Thank you for helping transform the lives of children, elderly people, their families and whole communities in the UK and around the world.