



Tips on How to Make or Update your Will.

Over the age of 18 years everyone should have an up to date professionally written will to ensure that after your death your life's wishes are carried out. This Guide will help to prepare you and help to answer the questions you will need when you get together with your solicitor.

All My Belongings (assets)

Value of property (House/Business)
Bank Accounts
Building Society Accounts
ISA's Saving certificates, Bonds
Stocks and Shares
Life Assurance Policies
Pension
Collectables (furniture, antiques)
Jewellery
Other possessions.

Total Asset Amount = £_____

All I Owe (Liabilities)

Outstanding Mortgage
Bank Loans
Credit Cards
Overdrafts
Other debts

Total Liabilities Amount = £_____

Total Assets Less Liabilities = £_____

Total Value of Your Estate = £_____

Whom do you include in your will?

Make a list of those people you would like to make a gift to in your will, consider the types of gifts you might want to leave them, money, property, jewellery ect. Also consider any causes, charities or organisations that you would want to include. Be aware that if you intend to leave a gift to a disable person please consider that this could mean they lose their means tested benefits, however there are ways of protecting against this and you should seek the advice of your solicitor.

Family

Friends

Charities/Organisations

Important Information:

My Executors

Legal Guardians (for children under 18)

Care of my dependent relative/s

Care of my Pets

My Previous Will Details

My Funeral Instructions and Wishes
