

WILL PLANNER



Claire House
CHILDREN'S HOSPICE

Registered Charity No. 1004058

This Will Planner is to help you prepare for writing your Will. Thinking about and completing these questions before your solicitors appointment will help to make the Will-writing process more efficient. If you are unsure about any of the questions, your solicitor will be happy to discuss them with you.

I. YOU

Full Name: Date of Birth:

Address:

Postcode:

Telephone Number: (Home) (Mobile)

Marital Status: ☐ Single ☐ Divorced ☐ Engaged ☐ Remarried ☐ Married ☐ Widowed ☐ Separated

2. YOUR SPOUSE OR PARTNER

Full Name: Date of Birth:

Address:

Postcode:

Telephone Number: (Home) (Mobile)

Marital Status: ☐ Single ☐ Divorced ☐ Engaged ☐ Remarried ☐ Married ☐ Widowed ☐ Separated

3. CHILDREN

Full Name	Address	Date of Birth	Status*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Whether the child is from this relationship, a previous relationship or other circumstances.

4. DO YOU HAVE AN EXISTING WILL?

You: ☐ Yes ☐ No Your Spouse or Partner: ☐ Yes ☐ No

5. NOMINATED GUARDIANS FOR ANY CHILD YET TO REACH ADULthood

Full Name	Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

6. DO YOU HAVE ANY PARTICULAR FUNERAL WISHES?

7. THE VALUE OF YOUR ESTATE

This section helps you work out the value of your estate.

The value of your major assets

Your home (or your 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"/>

Your major liabilities

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

Assets less liabilities = estate value	£ <input type="text"/>
---	------------------------

8. BEQUESTS

Specific items

e.g. cars, ornaments, jewellery. List the names and addresses of individuals and charities* to whom you would like to make a specific gift.

Full Name	Address	Description

Pecuniary bequests (set amounts of money).

List the names and addresses of individuals and charities* to whom you would like to leave a specific sum of money.

Full Name	Address	Amount (£)

Residuary bequests (a percentage or all of the remainder of your estate).

List the names and addresses of individuals and charities* to whom you would like to leave a proportion of your estate.

Full Name	Address	Amount (£)

*Including registered charity numbers

9. CHOICE OF EXECUTORS

It is common to appoint a trusted family member or friend. A solicitor can also act as an Executor but please note there is normally a charge for this service.

Name of Executors: (1)

(2)

Address of Executors: (1)

(2)

Relationship to you: (1)

(2)

Making your Will helps you to set down what you want to happen to your belongings and property after you are no longer here. A Will is helpful to your family and friends in the aftermath of your passing. Writing your Will is also an opportunity to do something lasting for a charity, furthering its cause way into the future.

There are several ways you can include a gift to charity. These include a specific, pecuniary or a residuary gift. A residuary gift is a share of your estate, after you have made provision for family and friends, and is a particular way of helping a charity which prevents you having to decide now on a precise sum.

If when writing or updating your Will, you kindly choose to include a gift for Claire House, your solicitor may ask you for our registered charity number, which is: 1004058.

Your solicitor will be able to answer all your questions about what should be included in your Will, including who you choose to act as executors, who you would like to appoint as legal guardians for any children, in the event of your death and details of any gifts you choose to make.

10. LEGAL MEANINGS

These are some of the words and terms you might encounter when making your Will.

Administrator

A person appointed by law to finalise your affairs if you die without leaving a Will.

Beneficiary

Anyone who receives something from your Will.

Bequest (also often called a legacy)

A gift in a Will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a percentage share of what is left after all other gifts have been made) or specific (a particular item or property).

Codicil

An addition or amendment to an existing Will.

Estate

The total value of everything you own at your time of death, minus any outstanding commitments.

Executor

A person you appoint to make sure the wishes stated in your Will are carried out.

Guardian

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

Intestacy

The situation that exists if you die without a valid Will.

Inheritance Tax

A tax levied at 40% of the value of your estate over the first £325,000. Gifts to your spouse or a charity are exempt.

Probate

The process that determines whether your Will is valid.

Testator (male) and Testatrix (female)

The person making the Will.

Trust

A provision you can put in your Will to treat part of your assets in a particular way after your death.