

Your Will Planner

Your Will is one of the most important legal documents you can make. Writing or updating it can often seem complicated – but it really doesn't have to be.

Here's a simple step-by-step guide to help you note down all the important things you want to include in your Will, so when you meet up with your solicitor or Will-writing service it's plain sailing. You might be surprised how much you've got to leave when you start to jot it down.

This Will Planner is not a Will. Your Will is a much more detailed document that should be written by a legal professional, this planner is just to help you get your thoughts in order.

Your simple 8 step guide.

- One** | Make a list of your valuable possessions.
- Two** | Make a list of what you owe or any debts you have.
- Three** | Consider what you might want to leave to your loved ones.
- Four** | Think about the causes closest to your heart.
- Five** | Choosing your Executor(s).
- Six** | Choosing your Guardian(s).
- Seven** | Thinking about your funeral.
- Eight** | Find a solicitor.

Make a list of your most valuable possessions.

This could include your house, savings, shares, jewellery, paintings etc. Then estimate how much you think they are worth – these values don't need to be completely accurate but having a general idea will mean you are more prepared when you meet with a solicitor or Will-writing service.

ITEM	ESTIMATED VALUE
Your Home (or share in it)	
Any other property(s) or land you own (or part own)	
Bank account(s)	
Investments	
Savings	
Stocks &/or shares	
Pensions	
Any type of insurance eg: Life insurance	
Any other types of savings eg: National Savings, premium bonds	
Car(s) or other vehicles	
Household items eg: Furniture, computers, TVs, paintings, ornaments	
Personal items eg: Jewellery	
Any other items you can think of	
Business assets	
Any money (or items) you are owed	
TOTAL	

Make a list of what you owe or any debts you have.

Once again this doesn't have to be completely accurate.

ITEM	ESTIMATED VALUE
Outstanding mortgage	
Any other loans	
Overdraft(s)	
Credit card balance(s)	
Any other money you owe	
TOTAL	

Consider what you might want to leave to loved ones.

Now you know what you have to leave, you can use the table below to decide who you want to leave what to. Think about what you would like them to receive, and whether it's a specific item, amount of money or share of your estate. You can remember as many people as you wish in your Will. If you run out of space on this form, you can continue on a separate sheet.

NAME	RELATIONSHIP
<input type="text"/>	<input type="text"/>

CONTACT DETAILS

ADDRESS:	
<input type="text"/>	
ADDRESS:	
<input type="text"/>	
TELEPHONE:	EMAIL:
<input type="text"/>	<input type="text"/>

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

Think about the causes closest to your heart.

One way to continue to support causes and charities that are important to you is to include a gift in your Will. If you choose to include Brooke in your Will you can find our details at www.thebrooke.org/get-involved/writing-amending-will

Or a list of full charity names and registration numbers can be found on the charity commission website at www.gov.uk/government/organisations/charity-commission.

You can remember as many charities as you wish in your Will. If you run out of space on this form, you can continue on a separate sheet.

FULL CHARITY NAME

CHARITY REGISTRATION NUMBER

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

FULL CHARITY NAME

CHARITY REGISTRATION NUMBER

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

FULL CHARITY NAME

CHARITY REGISTRATION NUMBER

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

FULL CHARITY NAME

CHARITY REGISTRATION NUMBER

GIFT DETAILS

SPECIFIC ITEM/AMOUNT/%SHARE

WILL I HAVE TO PAY TAX ON A GIFT LEFT TO A CHARITY IN MY WILL?

No. Any amount you leave to a charity will usually be exempt from inheritance tax.

If you're worried about the Inheritance Tax that might have to be paid when you die, donating some of your money to charity – in your Will – can reduce the bill. Leaving a part of your estate, or even your entire estate, to charity can reduce, and in some situations, eliminate the Inheritance Tax liability. This is due to the rule that states if you leave something to charity in your Will, then it won't count towards the total taxable value of your estate.

You can find out more about inheritance tax at

www.gov.uk/donating-to-charity/leaving-gifts-to-charity-in-your-will

Choosing your Executor(s).

You also need to think about who will carry out your wishes when you're gone. An Executor will manage everything including all the paperwork, so you should think in practical terms as to age and ability. You can have up to 4 executors although it is usual to choose 2 executors for your Will – and it's a good idea to discuss your wishes with the people you're thinking about appointing to make sure they agree.

Your Executor can be a friend or family member, or a professional such as a solicitor (if you choose a professional you may wish to instruct the firm rather than an individual solicitor just in case that solicitor retires).

If you would like more than 2 executors, you can provide their details on a separate sheet.

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

Choosing your Guardian(s).

At this stage it's also a good idea to think about who will look after any children or pets you have. This person will be known as a 'guardian'. In advance discuss your wishes with the people you wish to appoint to make sure they agree.

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

NAME

RELATIONSHIP

CONTACT DETAILS

ADDRESS:

ADDRESS:

TELEPHONE:

EMAIL:

Thinking about your funeral.

Next it can be useful to think about what your wishes are for your funeral – you can include any details here.

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Find a solicitor.

The final thing to do is find a solicitor. This could be a recommendation from someone you know or a solicitor you have used before. Alternatively you can look online – there are lots of websites that will list solicitors in your area. The Law society website is also a good place to start <https://solicitors.lawsociety.org.uk/>

Once you've completed this Will planner,
you can take it to your solicitor or Will-writing service.

IF YOU HAVE ANY QUESTIONS YOU CAN:

Call us on
0207 470 9343
any time between 9am-5pm,
Monday to Friday

Email us at
legacies@thebrooke.org

Or to find out more information on
including a gift in your Will visit
thebrooke.org/legacies

Key legal terms and what they mean

Some legal terms regularly appear in the Will-writing process. We've listed some of the most common ones you may find as you write or update your Will.

Assets

These are things you own that are worth money. They could be your house, your savings or shares. They could also be smaller items, such as jewellery or paintings.

Beneficiary

This is a person or institution (such as a charity) who receives a gift from a Will.

Codicil

This document acts as an amendment to your Will (instead of rewriting it), but which is signed and witnessed in the same way as a Will.

Estate

This is the total value of everything you own.

Executor

The person named in a Will to make sure the person who has written the Will's wishes are carried out. This can be a friend or family member or can be a solicitor.

Intestacy

This is what the estate of a person who dies without having made a Will is called.

Legacy

This is a gift of assets (such as money or property) in a Will.

Probate

This is the process of dealing with the estate of someone who has died, where their debts are cleared and the remaining assets are distributed according to their wishes.