

Planning your will

Leonard
Cheshire



This form is designed to help you prepare for questions your solicitor will ask when you make or update your will. **Please do not return this form to us as the information will be confidential.** It's so important to make a will as it means you have control over what happens to your belongings (ie, your estate) and helps protect those close to you after you die.

1. You

Full name:

Date of birth:

Address:

Postcode:

Telephone (Home):

(Mobile):

☐ Single ☐ Divorced ☐ Engaged ☐ Married ☐ Widowed ☐ Separated ☐ Civil partnership

2. Your spouse or partner (If applicable)

Full name:

Date of birth:

Address:

Postcode:

Telephone (Home):

(Mobile):

3. Your 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"/>

*Please state whether the child is from the relationship you detailed above, a previous relationship or other circumstances.

4. Existing will

Do you have an existing will?

☐ Yes ☐ No

Does your spouse or partner have an existing will?

☐ Yes ☐ No

5. Nominated guardians for any child yet to reach adulthood

Full Name:

Address:

6. Do you have any particular funeral wishes?

7. The value of your estate

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

The value of your major assets

Your home (or your share in it)

£

Other property or land

£

Cars and other vehicles

£

Home contents including furniture and fittings

£

Items of particular value (eg. jewellery or art)

£

Money in banks/building societies

£

Shares, investments, National Savings, Premium Bonds

£

Insurance and pensions

£

Other savings and assets

£

Total assets

£

Your major liabilities

Your mortgage

£

Loans and overdrafts

£

Credit cards

£

Credit or hire purchase agreements

£

Other liabilities

£

Total liabilities

£

Assets less liabilities = total estate

£

8. Gifts

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

List the names and addresses of individuals and charities (including the registered charity number) to whom you would like to leave a proportion of your estate.

Name:	Address:	Description of gift:

Pecuniary gifts (set amounts of money)

List the names and addresses of individuals and charities (including the registered charity number) to whom you would like to leave a specific sum of money.

Name:	Address:	Amount (£):

Specific gifts/items (e.g. cars, jewellery)

List the names and addresses of individuals and charities (including the registered charity number) to whom you would like to make a specific gift.

Name:	Address:	Description of item:
<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"/>
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9. Choosing your 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.

Full name of executor (1):

Address:

Postcode:

Relationship to you:

Full name of executor (2):

Address:

Postcode:

Relationship to you:

10. Legal meaning

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 residuary (generally stated as a percentage share of what is left after all other gifts have been made), pecuniary (a specific sum of money), 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 (at time of printing). Gifts to your spouse/civil partner or a charity are normally exempt.

NB - *You can cut the inheritance tax on the rest of your estate to 36% if you leave 10% or more of your net estate to charity.*

Legator

The person who leaves a gift in their will.

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.



Patron: Her Majesty The Queen Founder: Group Captain Lord Cheshire VC, OM, DSO, DFC.

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