

Will Planner

Your will is one of the most important legal documents you can make. It tells people what you would like to happen to your belongings, monies and property when you are no longer here. Use this planner to write some notes before you see an advocate to discuss your will.

This planner is not a legally binding document

Is this an amendment to an existing will? Yes/No

About you:

Name:

Date of Birth

Address

Your spouse/partner:

Name:

Date of Birth

Address

Marital status

Your children

Name	Address	Date of birth	Parent/s (if different to above)

Nominated Guardians for any child yet to reach adulthood

Name	Address

Executors of your will (who do you trust to act on your wishes)

Name	Address	Relationship to you

Do you have someone who will act as power of attorney?

This part gives you and your advocate an idea of what you have to give

What you own	value
Property/land	
Money in bank/building societies	
Vehicles	
Home contents (inc furniture)	
Shares, investments, bonds, other savings	
Insurance and pensions	
Business assets	
Are you owed any money	
Items of particular value	
Other	
Total Assets	

This part gives you and your advocate an idea of what you owe

What you owe	value
Mortgage	
Loans, credit agreements	
Overdraft	
Other	
Total liabilities	

Estimated value of your estate

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Notes

Legal terms I need to ask about

Advocates/lawyers near me

What is my budget for making a Will?

A large print version of this Will Planner is available on request