

WILL PREPARATION DOCUMENT

Just a few simple questions.



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

1. You	
Full Name:	
Address:	Date of Birth:
Telephone Number: (Home)	Email:
Marital Status: Single <input type="checkbox"/> Divorced <input type="checkbox"/> Engaged <input type="checkbox"/> Remarried <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Separated <input type="checkbox"/>	

2. Your spouse or partner	
Full Name:	
Address:	Date of Birth:
Telephone Number: (Home)	Email:
Marital Status: Single <input type="checkbox"/> Divorced <input type="checkbox"/> Engaged <input type="checkbox"/> Remarried <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Separated <input type="checkbox"/>	

3. Children			
Full Name	Address	Date of Birth	Status*

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

4. Do you have an existing will?	
You: Yes <input type="checkbox"/> No <input type="checkbox"/>	
Your spouse or partner: Yes <input type="checkbox"/> No <input type="checkbox"/>	

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5. Nominated guardians for any child yet to reach adulthood

If you have any children under the age of 18, you should consider appointing at least one guardian. When one parent dies, the surviving parent normally becomes the legal guardian, but it is of course possible that both parents may die together or you may be a single parent. Where a man is not married to the mother of his children he will not automatically become their guardian on the death of their mother. We will provide in your Will for your trustees to have power to make payments to the guardians for the maintenance, education and general benefit of your children.

Full Name	Address

6. Do you have any particular funeral wishes?

Do you wish to leave your body for medical research? Yes No

Do you wish to donate your organs for transplantation? Yes No

If yes, do you wish to donate all of your body? Yes No

If no, please specify which parts of your body you wish to donate

Is it your wish to be buried or cremated? Please specify Buried Cremated No preference

Please detail any specific funeral instructions

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)	£
Other property or land	£
Cars and other vehicles	£
Home contents including furniture and fittings	£
Items of particular value (e.g. jewellery or art)	£
Money in banks and 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 = estate value	£
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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 of Gift

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 if known.

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9. 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.

10. Choice of Executors

Executors are persons whom you appoint in your Will to carry out your wishes and administer your Estate. You may consider appointing your spouse/partner with additional or substitute Executors. This is a responsible position with some duties imposed by law and you may therefore consider appointing a professional Executor such as a solicitor. As a firm, we would be pleased to accept an appointment solely or with other persons and can offer full services for the efficient administration of your Estate. An Executor can be a beneficiary under your Will.

Executor(1)

Full Name:

Address:

Relationship to you:

Executor(2)

Full Name:

Address:

Relationship to you:

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