

## Preparing to visit your Solicitor

This form helps you think through the wishes you would like your solicitor to put in your Will. Fill in as much as you can before you visit your solicitor to save you time and money.

**Please note this form does not constitute legal advice and CANNOT substitute for a valid will.**

1. First, work out the value of your estate:

<b>YOUR ASSETS (everything you own)</b>	<b>VALUE (approx.)</b>
Your house & any other land or property	£
Contents (e.g. jewellery, furniture, paintings, electrical goods, other valuables)	£
Car(s)	£
Savings in bank accounts / building societies	£
Shares, investments, ISAs	£
Premium Bonds, national savings	£
Life insurance, endowments, pensions	£
Any business assets you own	£
Any other assets	£
<b>Total Assets</b>	<b>(A) £</b>
<b>YOUR LIABILITIES (everything you owe)</b>	<b>VALUE (approx.)</b>
Mortgage(s)	£
Loans outstanding	£
Bank overdraft(s)	£
Credit card debts	£
Any other money you owe	£
<b>Total Liabilities</b>	<b>(B) £</b>
<b>VALUE OF YOUR ESTATE (A – B)</b>	<b>£</b>

2. Secondly, list the family, friends and charities you would like to benefit from your Will, and decide what you would like to give to each one.

<b>SPECIFIC GIFTS (e.g. a piece of jewellery, furniture or painting)</b>		
Full name	Full address & phone no.	Description of item

<b>PECUNIARY GIFTS (a lump sum of money)</b>		
Full name	Full address & phone no.	Amount of Gift
		£
		£
		£
		£

<b>RESIDUARY GIFTS (sharing what is left of your estate after the above gifts have been made)</b>		
Full name	Full address & phone no.	Share of residuary estate
		%
		%
		%
		%

If you would like to leave gifts to a number of different parts of the Church and to other charities, you may like to use the Legacy Service from the Church of England.

**3. Consider what you would like to happen if any of your beneficiaries die before you?**

For example, you could specify that their gift be given to someone else, or that it should be shared equally amongst your other beneficiaries. Remember to tell your solicitor your preferences.

**4. Choose your executors.** It's usual to name two executors but you can have up to four. Check they are willing to take on this role; it's an unpaid role (although of course you may remember them in your Will). They should be well-organised and likely to survive you. You can name your solicitor or bank as an executor but they will take a fee from your estate for this type of service.

Executor's full name	Executor's full address & phone no.
1.	
2.	

**5. If you have any dependent children, you should appoint a guardian for them.**

If you do not, court may decide who should look after them, so this is really important. Make sure you ask the person if he/she is willing to be your child/ren's guardian first.

Guardian's full name	Guardian's full address & phone no.

**6. Finally, write here any additional questions you have for your solicitor.**

## A Short Glossary of Terms

### Beneficiaries:

Anyone (family, friends, charities, churches etc.) who receive a gift from your Will.

### Codicil:

An addition or amendment to your Will. It must be in a valid legal form and properly witnessed.

### Executors:

The people you choose to make sure the wishes in your Will are carried out.

### Probate:

A legal process to establish that your Will is valid (also known as 'proving the Will'). Once the process is complete, the Probate Registry will send your executors 'letters of administration' authorising them to divide up your estate according to the wishes in your Will.

### Testator / Testatrix:

The person who makes the Will.

### A Residuary Gift:

A gift of a share / percentage of your estate.

### A Pecuniary Gift:

A gift expressed as a lump sum of money e.g. £10,000.

### A Specific Gift:

Items such as furniture, antiques, a painting or your books.