

Thinking about writing your will?

Completing this form may help you prepare before meeting your professional adviser:

Name _____

Address _____

Partner's name _____

Address _____

Children's name(s) _____

Address _____

Legal guardian(s) name(s) _____

Address _____

Executors' name _____

Address _____

Any funeral instructions _____

Assets and Liabilities

Assets (what you own)

House (present value)	£ _____	Stocks, shares and bonds	£ _____
Antiques/paintings	£ _____	Unit and investment trusts	£ _____
Household contents	£ _____	Life assurance	£ _____
Vehicles	£ _____	Other savings	£ _____
Jewellery	£ _____	Pension benefits	£ _____
Savings	£ _____	Other	£ _____
Bank/building society accounts	£ _____	Total assets	£ _____

Liabilities (what you owe)

Outstanding mortgage	£ _____
Loans/HP agreements	£ _____
Credit card debts	£ _____
Any other debts	£ _____
Overdraft	£ _____
Outstanding tax	£ _____
Total liabilities	£ _____

Deduct your total liabilities from your total assets to calculate the value of your net estate. **Balance** £ _____



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