

THINKING ABOUT WRITING YOUR WILL?

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

Name: _____

Address: _____

Partner's name: _____

Address: _____

Name(s) of
any children: _____

Address: _____

Legal guardian(s)
name if applicable: _____

Address: _____

Executor name(s): _____

Any funeral
instructions: _____

**Remember to keep your original will in a safe place and up to date. It is a good idea to make
a couple of copies – one for you to keep and the other for the executor(s).**

Assets and liabilities

Assets (what you own)

House (present value) £ _____

Antiques/paintings £ _____

Household contents £ _____

Vehicles £ _____

Jewellery £ _____

Savings £ _____

Bank/building society accounts £ _____

Stocks, shares and bonds £ _____

Unit and investment trusts £ _____

Life assurance £ _____

Other savings £ _____

Pension benefits £ _____

Other £ _____

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.

Total assets £ _____



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