

Will planning checklist



If you're going to have your Will drafted, you can use this form to prepare for your appointment with your solicitor. It will capture most things they'll need to know.

Important names and addresses

Your full name and address

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Your partner's full name and address

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Executors' names, addresses, and phone numbers

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Executors are people who you choose to carry out the wishes in your Will. They might be family, friends, or your solicitor. People usually have two, but you can have up to four.

Remember to discuss this with them first.

Dependent children (You only need to complete this for children under the age of 18)

Children's full names and addresses

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Guardians' names, addresses, email and phone numbers

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You can choose who you would like to be the legal guardian of your dependent children until they turn 18. **Remember to discuss your wishes with them first.**

Pets

Pets species and names

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Guardians' names and addresses

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You can also choose who you'd like to care for your pets.

Working out what you've got to leave



Make a list here of what you own and what you owe at today's values. This will give you the approximate value of your estate. Your solicitor will be able to help you further at your appointment.

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What you own (assets)

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|---|----------|
| Your home (or your share in it) | £ |
| Other property or land | £ |
| Home contents (inc. furniture and fittings) | £ |
| Valuables (such as antiques, art and jewellery) | £ |
| Cars and vehicles | £ |
| Money in banks and building societies | £ |
| Stocks, shares and investments | £ |
| Insurance and pensions | £ |
| Other savings and assets | £ |
| TOTAL OF YOUR ASSETS (A) | £ |

What you owe (liabilities)

| | |
|------------------------------------|----------|
| Outstanding mortgage | £ |
| Other loans | £ |
| Overdrafts | £ |
| Credit card debts | £ |
| Credit or hire purchase agreements | £ |
| Other money owed | £ |
| TOTAL MONEY YOU OWE (B) | £ |

**TOTAL OF YOUR ASSETS (A) – TOTAL MONEY YOU OWE (B)
= APPROXIMATE VALUE OF YOUR ESTATE**

£

Your legacy – who you'd like to provide for



This may include your family, friends and charities or causes close to your heart.

I'd like to leave...

To this person or charity...

Describe what you'd like to leave. It may be an item, an amount of money or a percentage of your estate after all other payments are made.

Include their full name and contact details and, if leaving a gift to charity, the registered charity number.

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Please consider leaving a gift to Arnos Vale Cemetery Trust in your Will. Our information is:

Arnos Vale Cemetery Trust, West Lodge, Arnos Vale Cemetery, Bath Road, BS4 3EW.

A charity registered in England and Wales no. 1120210.

A gift left for Arnos Vale Cemetery Trust is a gift that will provide loving care and protection for this special place, full of beauty, tranquillity, and history, and deeply loved by so many people.

