

Will checklist

Using this checklist will help you assess the value of your estate, and could save you time and money with your solicitor or legal adviser.

1. Assets (everything I own)

House (present value)	£ _____
Land or other property	£ _____
Car	£ _____
Furniture	£ _____
Other household effects	£ _____
Jewellery	£ _____
Bank account(s) current total balance	£ _____
Building Society account(s) current total balance	£ _____
Post Office account(s) current total balance	£ _____
National Savings certificates and Premium Bonds	£ _____
Stocks, shares, bonds, unit and investment trusts	£ _____
Life assurance policies	£ _____
Pension death benefits	£ _____
Other savings and cash	£ _____
Money owed to me	£ _____
Anything else of value	£ _____
TOTAL ASSETS	£ _____

Liabilities (everything I owe)

Mortgage (current outstanding balance)	£ _____
Bank Loans	£ _____
Hire purchase agreements	£ _____
Credit card debts	£ _____
Other debts	£ _____
Tax due	£ _____
Any other liabilities	£ _____

Total liabilities	£ _____
Total assets	£ _____
Less total liabilities	£ _____
Total value of my estate	£ _____

2. A note of any money owed to me and by whom:

Name	Amount

3. A list of all the gifts/items I would like to leave, and the names and addresses of the persons/charities to whom I wish to leave them:

Specific bequests

Item	Name of beneficiary	Address
e.g. Picture	Mr Paul Smith	20 Any Road, Anyplace

Pecuniary bequests

Amount	Name of beneficiary	Address
e.g. £3000	Mrs Susan Jones	14 Any Road, Anyplace

Residuary bequests

Remainder	Name of beneficiary	Address
e.g. ½ share or % residue	The WESC Foundation Registered Charity Number 1058937	Countess Wear, Exeter, Devon EX2 6HA

4. A note of any property or possessions held jointly with someone else:

5. The names and addresses of the people I would like to be my executors:

Name

Address

6. The name and addresses of the people I would like to be legal guardians of my children:

Name

Address

7. The arrangements I would like made for the care of my dependent relative(s):

8. The name and address of the person I would like to look after my pets:

Name

Address

9. Details of my preferred funeral arrangements information/instructions for my next of kin/executor. Has a prepaid funeral been arranged?

10. Details of my previous Will (if applicable) and any other documents which may be helpful.

11. Questions I would like to ask
