



Will-planning checklist

Use our handy guide to help prepare you for writing your will. Regardless of whether you choose to write your will online or with a solicitor, this guide highlights the key areas you need to consider & information you need to gather.

1 People to consider

Think about the significant people in your life. Record their names and addresses. For example:

- your partner
- your executors (up to four people, chosen by you, to carry out the wishes in your will)
- your children
- your appointed guardian(s) (if you have children under 18 you may want to appoint a guardian. Some people also like to appoint a guardian to take care of their pets).

2 The value of what you own

Make a note of everything you own and its approximate value. Then record any debts/liabilities you have. Subtracting the second figure from the first gives you the value of your estate.

Assets	£	Debts/liabilities	£
Your home (or share of it)		Your mortgage	
Other property or land		Loans & overdrafts	
Cars or other vehicles		Credit card debts	
Home contents		Credit or HP agreements	
Valuables (such as jewellery)		Other liabilities	
Money in banks & building societies		Total debts/liabilities	
Shares, investments, savings etc		Total assets - total debts/liabilities = total estate value	
Insurance & pensions			
Other savings & assets			
Total assets			£

3 Who you would like to provide for

Decide who you would like to remember and what you would like to leave them. Consider if you'd like to leave them a cash amount, specific item or a percentage of what you own (your estate). After you've thought of your nearest and dearest, you may like to leave a gift or percentage of your estate to charities like Ride High.

Name	Amount	Specific item	% share