 Will Planner

The table below can help you calculate the value of your ‘estate,’ (the money and property you own) and work out what you can choose to give loved ones and/or causes you support. This is not an official or legal document (and cannot be used as a legal Will) but can be a useful resource to complete in preparation for meeting with your solicitor or speaking to a Will writing service.

|  |  |  |  |
| --- | --- | --- | --- |
| **Assets** | | **Liabilities** | |
| **Asset** | **Amount (£)** | **Liability** | **Amount (£)** |
| Home / other property |  | Mortgage |  |
| Bank Account |  | Equity release |  |
| Building Society Accounts |  | Other loans |  |
| Investments |  | Overdraft |  |
| Stocks and shares |  | Credit card balance |  |
| Premium bonds |  | Other |  |
| Life assurance |  | **TOTAL LIABILITIES** |  |
| Pension fund/s |  |
| Cars |  |
| Personal possessions |  |
| Other |  |
| **TOTAL ASSETS** |  |

|  |
| --- |
| **Deduct your total liabilities from your total assets to work out the net value of your estate:** |

**Beneficiaries** are the people and/or organisations you would like to leave something to in your Will. You may choose to leave a ‘pecuniary’ gift which is a specific sum of money, a particular item or a ‘residuary’ gift, which is a percentage of the value of your estate (everything you own), after any costs/debts. You will need full names and address details for your beneficiaries when you make your Will.

|  |  |
| --- | --- |
| Beneficiary 1 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

|  |  |
| --- | --- |
| Beneficiary 2 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

|  |  |
| --- | --- |
| Beneficiary 3 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

|  |  |
| --- | --- |
| Beneficiary 4 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

|  |  |
| --- | --- |
| Beneficiary 5 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

|  |  |
| --- | --- |
| Beneficiary 6 Full Name |  |
| Address |  |
| Postcode |  |
| Registered Charity Number (if applicable) |  |
| Percentage share / fixed amount / item |  |
| What should happen to this gift if the beneficiary does not survive you? |  |

**Notes:** ……………………………………………………………………………………………………………………………………………………………………

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**Executors** are the people who will carry out your wishes as stated in your Will. You will need to nominate at least 1 person; or name up to four people, in case for example the first person you nominate is not contactable. Executors can act independently or jointly. Executors must be over 18 and can include people who stand to benefit from your Will if you wish. Solicitors and accountants may also act as executors although they will typically charge a fee for this. You will need the full names and addresses of your executors for your Will. It is practical to advise your executors that you have nominated them and let them know where copies of your will are kept.

|  |  |
| --- | --- |
| Executor 1 Full Name |  |
| Address |  |
| Postcode |  |

|  |  |
| --- | --- |
| Executor 2 Full Name |  |
| Address |  |
| Postcode |  |

|  |  |
| --- | --- |
| Executor 3 Full Name |  |
| Address |  |
| Postcode |  |

|  |  |
| --- | --- |
| Executor 4 Full Name |  |
| Address |  |
| Postcode |  |

**Guardians:** If you have responsibility for any person under the age of 18 or someone else who relies on your care, you will need to consider who could look after them and appoint an appropriate guardian / guardians. You should also consider what would happen to any pets you may have.

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You may also want to note wishes in relation to your funeral at the same time as making your Will, such as any preference regarding burial or cremation, service or wake location, flowers or donations to a cause close to your heart. This can make it easier for loved ones, at a difficult time, to organise a fitting tribute.

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Gifts in Wills play an important role in preserving The Pennoyer Centre and its heritage for future generations. If you would like to remember our charity in your Will, please pass our details to your solicitor or Will writing service:

The Pennoyer Centre, Station Road, Pulham St. Mary, Diss, IP21 4QT

Registered Charity number: 1135788