

Checklist for a Will

Introduction

You may find it useful to complete this checklist before making your Will. It should help you gather your thoughts as to what you want done with your estate after your death and hopefully will help ensure that you give due consideration to all aspects of your situation.

If you decide to use a solicitor to draw up your Will you may find it helpful to complete the checklist before the meeting. This way you will have your thoughts in order. It will also ensure that if the solicitor is charging on a time basis the meeting is rather shorter than otherwise might be the case.

Section 1. Your Personal Details

1. Your Details

Forenames	<input type="text"/>
Surname	<input type="text"/>
Address	<input type="text"/>
Email	<input type="text"/>
Telephone No	<input type="text"/>
Date of Birth	<input type="text"/>
Occupation	<input type="text"/>

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

LASTING POST

Birth Name	Alias
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

2. Your Husband / Wife / Partner

Forenames	<input type="text"/>
Surname	<input type="text"/>
Date of Birth	<input type="text"/>
Occupation	<input type="text"/>

3. Marriage/Partnership Details

(a) Year of Marriage	<input type="text"/>
(b) Are you married to your partner	Yes <input type="checkbox"/> No <input type="checkbox"/>
(c) Do you intend to marry/re-marry in the near future	Yes <input type="checkbox"/> No <input type="checkbox"/>
(d) Has either of you been married before?	Yes <input type="checkbox"/> No <input type="checkbox"/>

4. Your children (including your children from a previous marriage or relationship) – full names, dates of birth, and addresses if different from yours.

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

LASTING POST

	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

5. Children of your husband/wife/partner's previous marriages or relationships – full name, date of birth and address if different from yours.

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

Please note:

- Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask a Solicitor for advice, if appropriate.

Section 2. Your Assets

6. Your Home – is your Home:

(a) Owned				
(i) In your name alone?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
(ii) In joint names with your husband/wife/partner?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
(iii) In the name of your husband/wife/partner alone?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
(b) Rented?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
(c) Other – e.g. Provided by a relative?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If you are not sure how you own your home, you should check with a Solicitor.

7. If your answer was (c) please give more details

8. Do you have a Business?

Yes No

If yes: - state type of business

Please tick one box

Company

Partnership

In your sole name

9. Your Main Assets

Please list your main assets below and give approximate values:

Asset	Value
<input type="text"/>	<input type="text"/>

10. Joint Assets

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

Asset	Value	Co-owner
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Please note: Jointly owned assets generally pass to the joint owner automatically and can not be given away by Will

11. Do you own any Assets abroad?

If yes, please give details:

Asset Type	Value	Location
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

LASTING POST

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 3. The Beneficiaries

The main part of your estate is called "the residue". (This is dealt with at question 14). Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries". Beneficiaries of cash gifts are sometimes referred to as "legatees".

12. Cash Gifts

Please give the full name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

13. Gifts of Articles

Please give the full names and addresses of people to whom you wish to leave specific items, and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing – he or she will not be given the substituted item or the cash equivalent.

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Article	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Article	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

LASTING POST

Article	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Article	<input type="text"/>

14. The Residue

This is all that you own except jointly owned property and the gifts made in questions 12 and 13. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, you may want to make a provision that if any of them dies before you leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the common provisions made. If you wish to use one of these tick the appropriate box; if not, please go to question 15.

Everything to my husband/wife/partner named at question 2 above,	
(a) outright, but if he/she has died then to my children, named at question 4 above, equally;	<input type="checkbox"/>
(b) everything to my children, named at question 4 above, equally and any other children of mine;	<input type="checkbox"/>
You may choose the age at which your children will receive their entitlement. Insert choice from 18, 21 or 25 years in this box:	<input type="text"/>
(c) to my husband/wife/partner named at question 2 above, but if he/she has died before me to the person(s)/ organisation(s) named in the box below. If not in equal shares, then show the share each is to take	<input type="checkbox"/>
<input type="text"/>	

15. If none of the above choices is appropriate –

LASTING POST

Please set out below who is to receive the residue and, if more than one person or organisation is involved, in what shares?

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Share	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Share	<input type="text"/>

Who is to benefit if the recipient dies before you?

Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>
Share	<input type="text"/>
Name	<input type="text"/>
Date of Birth	<input type="text"/>
Address	<input type="text"/>

LASTING POST

Share

Please note:

Details regarding the appointment of Executors, Guardian (if appropriate) and funeral details are dealt with separately in Lasting Post.

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