



## Will Planner

Making a will does not need to be daunting or challenging and once done can provide peace of mind and security for both you and your loved ones. Our will planner can help you to organise your affairs into a logical list that can help to make the process clear and straightforward.

### 1. About you

Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_ Postcode: \_\_\_\_\_  
 \_\_\_\_\_

Telephone land line: \_\_\_\_\_ mobile: \_\_\_\_\_

Marital Status: Single  Divorced  Engaged  Remarried  Married  Civil Partnership  Widowed  Separated

### 2. About your spouse, partner or civil partner

Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address (if different from above) \_\_\_\_\_  
 \_\_\_\_\_ Postcode: \_\_\_\_\_  
 \_\_\_\_\_

Telephone land line: \_\_\_\_\_ mobile: \_\_\_\_\_

Marital Status: Single  Divorced  Engaged  Remarried  Married  Civil Partnership  Widowed  Separated

### 3. Children

Full Name	Address	Date of Birth	Status*




\*Whether the child is from this relationship, a previous relationship or other circumstances such as adopted or stepchild.

**4. Do you have an existing will?**

You: Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure <input type="checkbox"/> Not sure <input type="checkbox"/>	Your spouse/partner/civil partner Yes <input type="checkbox"/> No <input type="checkbox"/>
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**5. Nominated guardians for any child under the age of 18**

Full Name	Address

**6. Do you have any personal funeral wishes?**

**7. About your estate**

In this section break down and list the value of your estate.

**The value of your major assets:**

Your home (or your share of it)	£ <input type="text"/>
Total of other property or land	£ <input type="text"/>
Cars and other vehicles	£ <input type="text"/>
Home contents such as furniture and fittings	£ <input type="text"/>



Items of particular value such as jewellery or art	£
Money in banks and/or building societies	£
Shares/investments/national savings/premium bonds	£
Insurance and pensions	£
Any other savings and assets	£
<b>Total Assets</b>	£

**Your liabilities**

Your mortgage	£
Loans and overdrafts	£
Credit cards	£
Credit or hire purchase agreements	£
Any other liabilities	£
<b>Total liabilities</b>	£

**8. Bequests**

Specific items such as jewellery, cars or property. Here you can choose the loved ones and charities\*/organisations that you would like to receive a gift from your estate.

Name	Address	Amount

\*including registered charity numbers



**Pecuniary bequests (set amount of money).** Here you can choose the loved ones and charities\*/organisations that you would like to receive a specific sum of money from your estate.

Name	Address	Amount

\*including registered charity numbers

**Residuary bequests (a percentage or all of the remainder of your estate).** Here you can choose the loved ones and charities\*/organisations that you would like to receive a share from the remainder of your estate.

Name	Address	Amount

\*including registered charity numbers

**Any special requests such as what should happen to any pets left behind, eg would you like your pet to go to someone special or a charity to be cared for?**

Name (of pet)	Any medical conditions	What to happen



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\*including registered charity numbers

**9. Power of Attorney**

In the event of an unforeseen serious accident/illness it is usual to nominate a trusted family member or friend to make important decisions on your behalf, including access to your bank accounts to make sure your affairs are kept in order.

Name of nominee	Address	Relationship to you

**10. Choice of Executors**

It is usual to appoint a trusted family member and/or friend. A solicitor can also act as Executor, but there is normally a charge for this service.

Name of Executor	Address	Relationship to you
1.		
2.		

**NB.** If you are taking part in our Free Will Month, then you are not under any obligation to leave a gift to CPRE Kent.

**Glossary of words and legal terms**

Here are some of the more common words and legal terms you may encounter, along with a simple explanation of their meaning.

**Administrator**

The person responsible by law to finalise your affairs if one dies intestate.

**Beneficiary**

Someone or charity/organisation who receives a gift from the will.

**Bequest**

A gift or legacy from a will. Either specific, pecuniary or residuary.



**Chargeable gift**

A gift in a will that will be subject to inheritance tax.

**Codicil**

An amendment or addition to an existing will.

**Deed of Variation**

A legal document that allows beneficiaries to alter the terms of a will.

**Disbursement**

Any payment made to a third party.

**Estate**

The total value of everything owned at the time of death once liabilities have been accounted for.

**Executor**

The person chosen to administer the wishes stated within the will.

**Gift over clause**

If a chosen beneficiary cannot or is unwilling to accept their bequest, a secondary recipient can be nominated by the will maker.

**Guardian**

The person chosen to take legal care of any children left behind after the death of one or more parents or current legal guardian if applicable.

**Intestacy or intestate**

When someone dies with no will.

**Inheritance tax**

The tax the Government imposes on estates over a certain amount, currently 40 per cent after the first £325,000. Gifts to a spouse or charity are exempt.

**Legacy**

Another name for a gift except property.

**Pecuniary**

The gift of money.

**Per Stirpes**

A way of distributing an estate equally to family members. Commonly used for grandchildren including any born after the will has been written. It is also used in cases where the beneficiary predeceases the will maker; their share can be re-distributed equally between any children.



**Predeceased**

A beneficiary of the will who dies before the will maker.

**Probate**

The process all wills undergo to determine their validity.

**Residuary estate**

After all specific bequests are settled, the assets that are left become part of the residuary estate.

**Testator (male) Testatrix (female)**

The person making a will.

**Trust**

A trust is a way of managing any asset (money/investments/land/buildings etc) for people. There are different types of trusts which, are managed and taxed differently.

**Trustees**

The people appointed to manage a trust.