# Planning Your Will

# YOUR PERSONAL DETAILS

(If you have a questionnaire)	partner, they can complete a separate
Full Name	
(including all	
middle	
names)	
Postal address	
Email address	
Telephone	
Date of Birth	
□ Married	□ Single □ Divorced
□ Widowed	Civil Partner Co-habiting
Have you made a	Will before?
T Yes	□No
Do you intend to r	narry or enter into a Civil
Partnership in the	-
□ Yes	□ No
Have vou been ma	arried or been in a Civil
Partnership before	
□ Yes	□ No
100	
Do you have any c	hildren?
<b>Yes</b>	$\Box$ No
•••	eir details and state if
they are from a pr	evious relationship:-

Full Name	Address	Date of Birth

#### APPOINTING EXECUTORS

Executors carry out the instructions in your Will. If your arrangements are simple, one Executor will suffice, but it is a good idea to name two. If a child or Trusts are involved, two Executors are essential. Your Executors can be relatives, friends or you can appoint Dale & Co. You should ask the person you wish to appoint as an Executor before naming them in your Will; it is a serious obligation. Executors can be a beneficiary but cannot witness your Will.

#### **MY EXECUTORS**

Full Name	Address	Relationship
		to you
	Tel :	
	Tel :	

## A GUARDIAN FOR YOUR CHILDREN

If you have children under the age of 18, you may wish to choose a guardian to take parental responsibility.

Full Name	Address	Relationship to you

#### MAINTENANCE FOR YOUR DEPENDENTS

Please name anyone who relies upon you for their financial maintenance.

Relationship to you

#### THE VALUE OF YOUR ESTATE

Completing this section will give an idea of the value of your estate. Please use current approximate valuations.

# Assets - Please indicate if solely or jointly owned

Type of asset		£	Sole	Joint
Ownership/share of any property	Main Home			
	Other/Abroad			
Savings	Savings			
	accounts			
	National			
	Savings			
	Premium Bonds			
	Other			
Investments				
	PEP's			
	Other			
Insurance	Life Assurance			
	Pensions			
	Other			

Personal	Household				
Possessions	contents				
	Jewellery				
	Vehicles				
	Valuables				
	Other				
Other assets					
Other income					
Total		£			

#### Liabilities - Please indicate whether solely or jointly owed

Type of liability	£	Sole	Joint
Mortgage			
Bank loans			
Credit cards			
Other			
Total	£		

## WHO DO YOU WANT TO BENEFIT IN YOUR WILL?

If there is not enough room here to list all your beneficiaries and gifts, continue on a separate sheet of paper.

#### **RESIDUARY ESTATE**

After legacies, taxes, funeral expenses etc. have been paid, what is left is the Residuary Estate.

Who would you like to receive your Residuary Estate?

Beneficiary's address	full	name	and	What share of your estate

# ALTERNATIVE BENEFICIARIES

It is a good idea to name alternative beneficiaries in case a beneficiary dies before you.

Beneficiary's full name and address	What share of your estate?

# LEGACIES/GIFTS

Please list below any specific or monetary bequests you wish to make.

A pecuniary bequest is a gift of a fixed sum of money A specific bequest is a gift of a particular item A reversionary bequest is a gift of property or possessions left to someone for the rest of their life, which is then passed on to someone else.

Full nam beneficia	and	address	of	What gift do you want to leave?

### FUNERAL DIRECTIONS

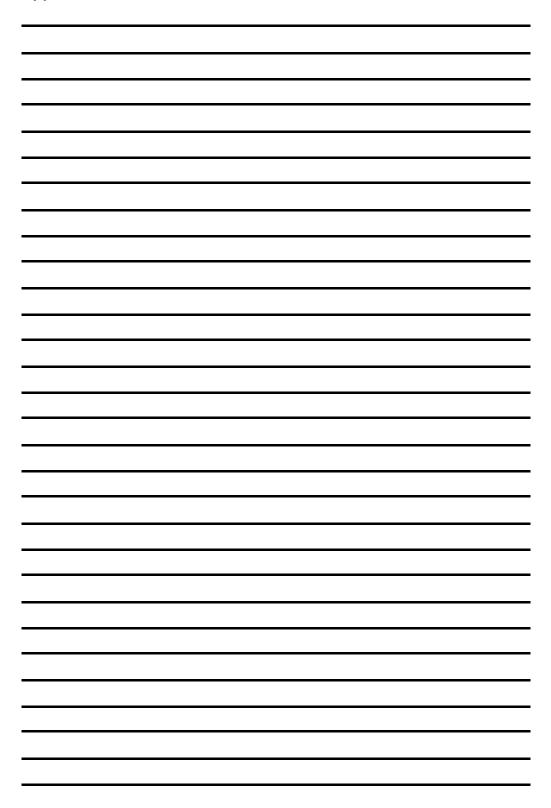
Ensure your loved ones are aware of your specific wishes. It may be uncomfortable thinking about these things now but it will make it easier for family and friends.

# Would you prefer to be buried or cremated?

Specific Wishes:

#### NOTES

Please note below any queries you wish to discuss at your appointment.



(V: 07.11.19)