

# WILL PLANNER

This Will Planner is to help you prepare for questions the solicitor will ask at your appointment.

Thinking about and completing these questions before your appointment will help to save time and make the Will-writing process more efficient. If you are unsure about any of the questions, the solicitor will be happy to discuss them with you.

## 1. YOU

<b>Full Name:</b>		<b>Date of Birth:</b>	
<b>Address:</b>			
		<b>Postcode:</b>	
<b>Telephone Number:</b> (Home)		(Mobile)	
<b>Marital Status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Engaged <input type="checkbox"/> Remarried <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Separated			

## 2. YOUR SPOUSE OR PARTNER

<b>Full Name:</b>		<b>Date of Birth:</b>	
<b>Address:</b>			
		<b>Postcode:</b>	
<b>Telephone Number:</b> (Home)		(Mobile)	
<b>Marital Status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Engaged <input type="checkbox"/> Remarried <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Separated			

## 3. CHILDREN

Full Name	Address	Date of Birth	Status*

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

#### 4. DO YOU HAVE AN EXISTING WILL?

You:  Yes  No

Your Spouse or Partner:  Yes  No

#### 5. NOMINATED GUARDIANS FOR ANY CHILD YET TO REACH ADULTHOOD

Full Name	Address

#### 6. DO YOU HAVE ANY PARTICULAR FUNERAL WISHES?

#### 7. THE VALUE OF YOUR ESTATE

This section helps you work out the value of your estate.

##### THE VALUE OF YOUR MAJOR ASSETS

Your home (or your share in it)	£
Other property or land	£
Cars and other vehicles	£
Home contents including furniture and fittings	£
Items of particular value (e.g. jewellery or art)	£
Money in banks and building societies	£
Shares, investments, National Savings, Premium Bonds	£
Insurance and pensions	£
Other savings and assets	£
<b>Total Assets</b>	£
<b>YOUR MAJOR LIABILITIES</b>	
Your mortgage	£
Loans and overdrafts	£
Credit cards	£
Credit or hire purchase agreements	£
Other liabilities	£
<b>Total Liabilities</b>	£
<b>Assets less liabilities = estate value</b>	£

## 8. BEQUESTS

**Specific items e.g. cars, ornaments, jewellery.** List the names and addresses of individuals and charities\* to whom you would like to make a specific gift.

Name	Address	Description

**Pecuniary bequests (set amounts of money).** List the names and addresses of individuals and charities\* to whom you would like to leave a specific sum of money.

Name	Address	Description

**Residuary bequests (a percentage or all of the remainder of your estate).** List the names and addresses of individuals and charities\* to whom you would like to leave a proportion of your estate.

Name	Address	Description

\*Including registered charity numbers.

## 9. CHOICE OF EXECUTORS

It is common to appoint a trusted family member or friend. A solicitor can also act as an Executor but please note there is normally a charge for this service.

### EXECUTOR ONE

Name of Executor:

Address:

Postcode:

Relationship to you:

### EXECUTOR TWO

Name of Executor:

Address:

Postcode:

Relationship to you:

Making your Will is vital, enabling you to set down what you want to happen to your belongings and property after you are no longer here. A Will is also helpful to your family and friends in the aftermath of your passing.

### GET IN TOUCH WITH SSAFA

- Call **020 7463 9257**
- Email [legacy@ssafa.org.uk](mailto:legacy@ssafa.org.uk)
- Visit [ssafa.org.uk/legacy](https://ssafa.org.uk/legacy)
- Write to **SSAFA, the Armed Forces charity,  
Queen Elizabeth House, 4 St. Dunstan's Hill,  
London EC3R 8AD**