

Getting ready to write your Will

Before you visit a solicitor, it's worth going through this simple checklist to work out what you need to include in your Will. It can help you calculate the total value of your estate, and could save time later on.

Make sure to take this checklist with you when you see your solicitor, along with any other relevant documents, such as bank account details, valuations for valuable items and any Will(s) you have written previously.

1 Section 1 – your estate

What you own	You £	Your partner £	Held together £
Your house			
Other properties			
The contents of your house			
Land			
Bank or Building Society Accounts			
Valuable items, eg art or jewellery			
Investments and shares			
Tax-free savings eg ISAs and PEPs			
National Savings and Premium Bonds			
Life insurance			
Mortgage protection cover			
Assets overseas			
Other savings			
Total A			
What you owe			
Your mortgage			
Credit cards and store cards			
HP agreements			
Loans and overdrafts			
Any other debt			
Total B			
The total value of your estate (ie Total A minus Total B)			



2 Section 2 – your executors

Your executors are the people who will make sure your wishes are carried out. It's a good idea to choose someone who is a generation younger than you, as they will be likely to still be alive when you pass away. It's also worth asking someone if they're happy to be an executor before you name them in your Will.

Your executors will have to get in touch with businesses like your bank and utility companies, and get together all the documents that are relevant to your Will. You should choose someone who is responsible and whom you trust to do a good job.

Name	
Address	
Postcode	

Name	
Address	
Postcode	

3 Section 3 – appointing a guardian

If you have young children, you can name someone in your Will as their guardian. This person will be responsible for your children's upkeep if you die before they have reached the age of 18.

Name	
Address	
Postcode	

DID YOU KNOW?

Without gifts in Wills, 2 out of 3 guide dogs simply would not exist

4 Section 4 – leaving a percentage of your estate to a charity

Once your relatives and friends have received the specific gifts mentioned in your Will, there will probably be some value still left in your estate. You can leave a percentage of this to other people and charities, sharing it amongst them. This is called a 'Residuary' gift.

Charities prefer receiving residuary gifts as unlike gifts of specific sums of money they keep pace with inflation.

Name of charity	
Registered charity number	
Address	
Postcode	
Percentage share you would like the charity to receive	

Name of charity	
Registered charity number	
Address	
Postcode	
Percentage share you would like the charity to receive	



5 Section 5 – leaving a specific sum of money to a charity

If you'd like to leave a sum of money to a charity, this is known as a 'Pecuniary' gift. You can make as many pecuniary gifts as you like. However, you may find it easier to simply specify a percentage of your estate that you'd like to leave – **please go back to section 4 if you'd like to know more.**

Name of charity	
Address	
Postcode	

Gift you wish to give (£)	
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Name of charity	
Address	
Postcode	

Gift you wish to give (£)	
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DID YOU KNOW?

It costs over £40,000 to support each guide dog partnership

That's why we depend on gifts in Wills

Don't forget to take this form along with you when you meet your solicitor. You may also want to make a copy for your own records too. If you'd like to know anything more about writing a Will, particularly on leaving gifts to charities, **please feel free to call the Guide Dogs Gifts in Wills team on 0845 603 1477.**

6 Section 6 – leaving a specific item to a charity

Perhaps you'd like to leave a specific item of value like a painting or some jewellery. These are called 'Specific' gifts.

Name of charity	
Address	
Postcode	

The item you would like to leave	
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Name of charity	
Address	
Postcode	

The item you would like to leave	
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7 Section 7 – your funeral

In your Will you can let people know your wishes for your funeral, for example, whether you'd like to be buried or cremated, and where you would like your funeral to be. You may also like to suggest to the executors or your loved ones that you would prefer to have donations made to a good cause instead of gifts or flowers at your funeral.

