

# Will Planner

**FREE WILLS  
MONTH**  
helping great charities

This Will Planner is to help you prepare for questions the lawyer 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 attorney will be happy to discuss them with you.

## 1. You

**Full Name:**..... **Date of Birth:** ..... / ..... / .....

**Address:** .....

..... **Postalcode:**.....

**Telephone Number:** (Home)..... (Cell) .....

**Marital Status:** Single  Divorced  Engaged  Remarried  Married  Widowed  Separated

## 2. Your spouse or partner

**Full Name:**..... **Date Of Birth:** ..... / ..... / .....

**Address:** .....

..... **Postalcode:**.....

**Telephone Number:** (Home)..... (Cell) .....

**Marital Status:** Single  Divorced  Engaged  Remarried  Married  Widowed  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)	\$ <input type="text"/>
Other property or land	\$ <input type="text"/>
Cars and other vehicles	\$ <input type="text"/>
Home contents including furniture and fittings	\$ <input type="text"/>
Items of particular value (e.g. jewelry or art)	\$ <input type="text"/>
Money in banks and savings institutions	\$ <input type="text"/>
Shares of stock, investments, bonds	\$ <input type="text"/>
Insurance and pensions	\$ <input type="text"/>
Other savings and assets	\$ <input type="text"/>
<b>Total Assets</b>	<b>\$ <input type="text"/></b>

##### Your major liabilities

Your mortgage	\$ <input type="text"/>
Loans and overdrafts	\$ <input type="text"/>
Credit cards	\$ <input type="text"/>
Credit or other debts	\$ <input type="text"/>
Other liabilities	\$ <input type="text"/>
<b>Total Liabilities</b>	<b>\$ <input type="text"/></b>

**Assets less liabilities = estate value** **\$**

## 8. Bequests

**Specific items e.g. cars, ornaments, jewelry.** 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	Amount (\$)

**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	Amount (\$)

\* including registered charity numbers

## 9. Choice of Executors

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

Name of Executors: (1) .....  
(2) .....

Address of Executors: (1) .....  
.....  
(2) .....  
.....

Relationship to you: (1) .....  
(2) .....

**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.

Writing your Will is also an opportunity to do do something lasting for a charity, furthering its cause way into the future. A share of your estate, after you have made provision for family and friends, is a particularly tidy way of helping a charity and prevents you having to decide now on a precise sum.\*

Your Free Wills Month lawyer will be able answer all your questions about what should be in your Will, including any charitable gifts you choose to make.

\* Under the terms of Free Wills Month, you are not obliged to include a gift to any of the charities.



## 10. Legal meanings

**These are some of the words and terms you might encounter when making your Will.**

### **Administrator**

A person appointed by law to finalize your affairs if you die without leaving a Will.

### **Beneficiary**

Anyone who receives something from your Will.

### **Bequest (also often called a legacy)**

A gift in a Will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a percentage share of what is left after all other gifts have been made) or specific (a particular item or property).

### **Codicil**

An addition or amendment to an existing Will.

### **Estate**

The total value of everything you own at your time of death, minus any outstanding commitments.

### **Executor**

A person you appoint to make sure the wishes stated in your Will are carried out.

### **Guardian**

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

### **Intestacy**

The situation that exists if you die without a valid Will.

### **Probate**

The process that determines whether your Will is valid.

### **Testator (male) and Testatrix (female)**

The person making the Will.

### **Trust**

A provision you can put in your Will to treat part of your assets in a particular way after your death.