

# Preparing for a visit to your Solicitor

This form has been designed to assist you when making your Will. By completing as much of this form as you can before you visit your solicitor, you will ensure you have the essential information the solicitor needs. Try to include full names and addresses where possible. If you have previously made a Will, please take it along with you when you visit the solicitor.

*Note: This form cannot act as a valid Will. It is simply an aid to Will-making.*

## 1. Your details

Your name

Your address

Postcode

Your telephone

## 2. Value your assets

Your assets or what you own

	Value in £'s
Your home	£
Additional property or land	£
Home contents (include furniture and fittings, electrical goods, etc)	£
Cars and other vehicles	£
Items of individual value (include jewellery, art, antiques, cameras, etc)	£
Savings in banks and building societies	£
Insurance and pensions	£
Shares and investments	£
National Savings, Premium Bonds, etc	£
Other assets	£
<b>Total assets:</b>	£

Your liabilities or what you owe

	Value in £'s
Your mortgage	£
Overdrafts and loans	£
Credit or HP agreements	£
Other:	£
<b>Total liabilities:</b>	£
<b>Your total assets, less liabilities:</b> (This is the estimated value of your estate at the present time)	£

### 3. Gifts of money

Please list any set sums of money you may wish to leave to people and/or your parish/charities. These are called *pecuniary legacies*. (Alternatively, you may wish to leave the residue of your estate (or a proportion of it) to your parish or a charity, once you have made provision for your family and friends. Please see section 5 to do this.)

Beneficiary's Details		Amount
Name		£
Address		
PostCode:	Tel:	
Name		£
Address		
PostCode:	Tel:	
Name		£
Address		
PostCode:	Tel:	

*If necessary, continue on a separate piece of paper*

### 4. Specific Items

List any specific items that you wish to leave to people and/or your parish/charities. These gifts are called *specific legacies*.

Beneficiaries	
Name:	Item:
Description of item:	
Address:	
Postcode:	Tel:
Name:	Item:
Description of item:	
Address:	
Postcode:	Tel:
Name:	Item:
Description of item:	
Address:	
Postcode:	Tel:

*If necessary, continue on a separate piece of paper*



## 7. Your Executors

These should be the people who you would like to be responsible for ensuring that your wishes are carried out. It is usual to select two people, although you can have up to four. Ensure that at least one of your Executors is likely to survive you. It is possible to make your Solicitor one of your Executors. However, there will be a charge for this service.

<b>Executors</b>	
Name:	
Address:	
Postcode:	Tel:
Name:	
Address:	
Postcode:	Tel:
Name:	
Address:	
Postcode:	Tel:
Name:	
Address:	
Postcode:	Tel:

## 8. Do you have young children?

If you do, it is advisable to appoint someone to act as their guardian, in case you die before they are 18 years old.

<b>Guardian</b>	
Name:	
Address:	
Postcode:	Tel:

## 9. Do you have any questions you would like to ask your Solicitor?

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