

My Will Checklist

Solicitors may charge by the hour, so the more prepared you are before your visit, the more time and money you will save. To this end you will find it helpful to complete this Will checklist and take it along with you as a handy reminder.

What to take to the solicitor

(a) A list of assets and liabilities:

Assets (everything I own):	
House (present value)	
Land or other property	
Car	
Furniture	
Other household effects	
Jewellery	
Bank account(s) current	
Building society account(s) total	
Post office account(s) balances	
National Savings certificates and Premium Bonds	
Stocks, shares, bonds and unit and investment trusts	
Life assurance policies (including mortgage protection): death benefits	
Pension death benefits	
Other savings and cash	
Money owed to me	
Anything else of value	
Total Assets	

Liabilities (everything I owe):	
Mortgage (current outstanding balance)	
Bank Loan	
Hire Purchase agreements	
Credit card debts	
Other debts	
Tax due	
Any other liabilities	
Total Liabilities	

Total Assets less Total Liabilities = Total Value Of My Estate

My Will Checklist

(b) A note of any money owed to me and by whom:

(c) A list of all the gifts/items I would like to leave and the names and addresses of the persons/charities to whom I wish to leave them:

Item (specific bequest)	Name of beneficiary	Address
<i>e.g. gold bracelet to:</i>	<i>Mrs Mary Smith</i>	<i>20 Acacia Gardens, Anytown</i>
Amount (pecuniary bequest) <i>e.g. £5000 to:</i>	<i>Mr John Brown</i>	<i>10 Railway Terrace, Someplace</i>
Remainder (residuary bequest) <i>e.g. ¼ share or % of residue to: Charity of my choice, Address, Charity No.</i>		

(d) A note of any property or possessions held jointly with someone else:

(e) The names and address(es) of the people I would like to be my executors:

(f) The name and address of the people I would like to be legal guardians of my children:

(g) The arrangements I would like made for the care of my dependent relative(s):

My Will Checklist

(h) The name and address of the person I would like to look after my pets:

(i) Details of my preferred funeral arrangements:

(j) My previous Will (if applicable) and any other documents which may be helpful.

(k) A list of questions I would like to ask:

**Bible Society ● Care for the family ● CMS ● The Leprosy Mission
Livability ● The Mission to Seafarers**

Correspondence address: Christian Legacy, Garth House, Leon Avenue, Cardiff
CF15 7RG. Tel: 029 2081 0800. email: enquiries@christianlegacy.org.uk