



WILL PLANNER

Personal Information

Your name:

Your address:

Your Partner's name and address (if different):

Children's names and addresses (if different):

Name and address of guardians for Children under 18:

Any particular funeral wishes:

Executor(s) names and addresses:

(It is common to have 2 Executors, but you can appoint anywhere between 1 and 4)

Approximate value of your estate

Property

Property/holiday home/land	£
Vehicle(s)	£
Home contents including furniture	£
Items of particular value e.g. art/jewellery/antiques	£
Other	£

Financial

Money held in bank account	£
Money held in building society	£
Stocks/shares/investments/bonds	£
Insurance policies/pensions	£
Other	£
Total assets	£

LIABILITIES

Mortgage	£
Loans/overdrafts	£
Credit agreements	£
Credit cards	£
Credit or hire purchase agreements	£
Other	£
Total liabilities	£
Total Value of Estate	£

Who do you want to provide for?

Name	Address	Specific item	Fixed sum of money	% Share of residue
<i>Example: My WiSH Charity (Registered Charity Number: 1049233)</i>	<i>Oak House, Hardwick Lane, Bury St Edmunds, IP33 2QZ</i>			

Making a 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 period after your passing. Writing a Will is also an opportunity to do something lasting for a My WiSH Charity by furthering our cause way into the future.