



Chorus Independent Financial Planning

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WILLS CHECKLIST

Complete as much of this form as you can before the meeting with your solicitor – it will make your visit quicker and simpler.

- (1) Make a note of your chosen **Executors**, who are responsible for post death administration.

Usually two, you are allowed up to four. Ask their consent first.

Choose your partner, a family member, a good friend, or a professional person.

Name

Address

Telephone

Name

Address

Telephone

- (2) Make a note of your chosen **Guardians**, who would be responsible for under 18 year olds.

Usually one, though an alternative can be helpful and ask their consent first. Choose someone who you can trust to look after your children. Consider arranging life insurance funds in trust to provide for their needs.

Name

Address

Telephone

Occupation

Name

Address

Telephone

Occupation

- (3) List your major **Assets** and their approximate value.

Assets	Estimated Value
Your Home	£
Other Property	£
House Contents (inc. furniture, clothes, etc.)	£
Antiques/Fine Art/Collections	£
Jewellery	£
Cars	£
Other Assets or valuables	£

Financial Assets	Estimated Value
Building Society accounts	£
Bank accounts	£
National Savings (incl premium bonds)	£
Unit Trusts and Investment ISAs	£
Shares	£
Business Assets and Interests	£
Life Insurance benefits	£
Other Assets	£

(4) Make a note of **money you owe**.

Mortgages/ Secured Loans	£
Unsecured Loans/ Hire Purchase	£
Other money owed	£

(5) Make a note of **money owed to you**

Amount	£
Name & Address	

(6) Make a list of **family, friends, your church, or charities you want to benefit and how** (e.g. monetary amount or percentage, specific items, or the remainder) plus a note of what happens if they die before you do

Name	Address	£ or % or Item
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(7) Do you wish to set up a **Trust Fund** for the benefit of children/grandchildren/others?
(Please ask for advice on this matter)

(8) Are you concerned about paying **Inheritance Tax**? (If so please ask for advice on this matter)

(9) Have you **overseas property** or holdings? (If so you must ask for specific advice on overseas Wills)

(10) Would you prefer a **burial or cremation**, and have you any **special requests** regarding your ceremony or final resting place? (Describe this clearly, though do not get too complicated!)

(11) Have you arranged a **Lasting Power of Attorney** in case of incapacity? No, you're not too young!
(Please ask for information and advice on this matter)

(12) Make a note here of any **questions** you wish to ask at the meeting