

Your Wills checklist

Here are the items you should consider when writing or updating your Will. Add notes as you go. Once you've finished, you can use this to help write your Will either online or in person with your legal service.

Top Tip:

You may wish to have a trusted person with you to help you go through your checklist to be certain you have thought through all you need to include.

You and your family

Full name:

Email:

Phone:

Date of birth:

Marital status: Married Single Widowed

Spouse's full name:

Children's full names:

If your children are under 18 years, have you chosen guardians? Yes No

Guardian 1

Name:

Address:

Postcode:

Guardian 2

Name:

Address:

Postcode:

Your property and assets (a rough guide)

Home address:

Postcode:

Estimated value:

Mortgage (lender's name, total loan amount):

Second property

Address:

Postcode:

Estimated value:

Mortgage (lender's name, total loan amount):

Other properties:

Savings plans and ISAs etc

Bank/building society name:

Life Insurer's name:

Have you completed a nomination form? Yes No

Pension(s) or Life insurance plan(s)

Provider's name(s):

Have you completed a nomination form with them?

Yes No

Other main assets (just a brief list: shares, vehicles, jewellery etc):



To download an editable word version of our Wills checklist, please scan the QR code

Continued overleaf

Your Will

Have you made a Will before? Yes No

If yes, where is it held?
.....
.....

Do you have a copy? Yes No

Is your spouse also making a Will now? Yes No

Executors: have you chosen and agreed with up to four people? It is normal to ask them first. They could be family members, close friends, or a solicitor.

Yes No

Executor 1

Name:

Address:

.....

Postcode:

Executor 2

Name:

Address:

.....

Postcode:

Your funeral instructions

Have you discussed with your spouse/family?

Yes No

Please indicate your funeral preference:

Burial

Cremation

Body for research or medical purposes

Lasting Power of Attorney (LPA)

LPAs allow others to care for you during your lifetime, if you are unable to. There are two types of LPA: (1) for health and care; (2) for money and property.

Have you appointed attorneys? Yes No

If yes, please give their names and addresses:

Attorney 1

Name:

Address:

.....

Postcode:

Attorney 2

Name:

Address:

.....

Postcode:



If you would like to add a gift to Wycliffe in your Will, you can download the wording you will need by scanning the QR code. Our full charity details are also listed on the back of this folder. Thank you!

Gifts in your Will

Gifts in your Will that you wish to give. These can be either a percentage share of your whole estate, an item (eg jewellery, car, valuable object) or a fixed cash amount. Please identify item/amount/share and to whom it is to be given:

| Gift | Person or charity full name: | Share of estate? Y/N | Fixed cash amount or item? Y/N | Item details/amount or percentage of estate: |
|------|------------------------------|----------------------|--------------------------------|--|
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Information about Inheritance Tax (IHT)

Tax Benefits for leaving gifts in your Will: It is worth noting that if you leave 10% or more of your Net Estate to registered charities, the Taxable Estate is reduced by that gift, AND you only pay tax on the remainder at 36% not 40%. This could mean a significant tax saving. **Please note: Wycliffe always advises that you seek legal advice to ensure that your wishes are made clear and legal.**

Continued overleaf

Additional information

Please use this box if you require more space to answer any of the questions on the previous two pages.

