

**...there's a way to help you, your family and your favourite charity!**

If you fill in this form it will help us greatly to draw up your will as quickly as possible.

Your full name

Your full address

Your email address

Postcode

Your partner's full name

Your partner's full address (if different from your own)

Postcode

Executors' full names and addresses

Full name	Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Children's full names, dates of birth and addresses (if different from your own)

Full name	DOB	Address
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Guardian's full names and addresses

Full name	Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

## What is the value of your major assets?

Your Home (or your share in it)

£

notes

Other Property or Land

£

notes

Cars and other vehicles

£

notes

Home contents including furniture & fittings

£

notes

Items of particular value (e.g. jewellery, art, etc...)

£

notes

Money in banks and building societies

£

notes

Shares / investments / national savings / premiums bonds etc...

£

notes

Insurance and pensions

£

notes

Other savings and assets

£

notes

**TOTAL ASSETS**

£

## What are your major liabilities?

Your mortgage

£

notes

Loans and overdrafts

£

notes

Your credit cards

£

notes

Credit or HP agreements

£

notes

Other liabilities

£

notes

**TOTAL LIABILITIES**

£

**Assets - liabilities =  
TOTAL ESTATE VALUE:**

£

2

## Bequests

### Specific (item) Bequests:

Write down in full the name and address of all individuals and charities you want to benefit together with a brief description of the item.

Full name	Address	Item description

### Pecuniary (set amount of money) Bequests:

Write down in full the name and addresses of all individuals and charities you want to benefit and the amount.

Full name	Address	Amount

## Bequests

### Residuary bequest (a part, or all, of the residue of your estate):

Write down in full the names and addresses of all individuals and charities (with registered charity numbers), together with their proportion of the residue of your estate.

Full name	Address (and charity number if applicable)	residue

What do you want to happen to your bequests if any of your beneficiaries die before you do?

Please list any questions you may have for your solicitor

Note: The **EasyWillPlanner** cannot be used as a valid Will.

## Legal terms you might come across when making your Will:

### An Administrator

is someone who is appointed by law to settle your affairs if you die without a Will.

### A Beneficiary

is anyone who receives something from a Will.

### A Bequest (legacy)

is a gift left in a Will. It can be:

**Specific:** a definite object or property.

**Pecuniary:** a gift of a particular sum of money.

**Residuary:** a gift of money or assets left when other legacies and expenses have been paid. It is normally expressed as a part of a percentage of the residue of your estate.

### A Codicil

is an addition or amendment to an existing Will.

### Your Estate

Is the total value of everything that you own at your death, less any outstanding commitments.

### An Executor

is the person or people you choose to make your Will happen. They can be a relative, a friend or your solicitor. Your Executors will administer your estate and distribute your assets in accordance with your will

### Guardians

The people chosen by parents to look after their children in the event of their death.

### Intestacy

Is the name for the situation which arises when someone dies without making a Will.

### Inheritance Tax

Is a 40% tax deducted from estates with a value of more than the inheritance tax threshold which is currently £312,000. Money left to your spouse or a charity is not taxed.

### Probate

Is the legal process to establish whether your will is valid. If not, an Administrator is appointed.

### A Testator/Testatrix

Is the person making the Will.

### A Trust

Is an arrangement you can make in your Will to administer part of your assets after your death.

### A Trust

Are the people who will look after your trust funds until they can be distributed.

Call us on:  
0121 240 9115

Email us at:  
[info@harveymckibbin.co.uk](mailto:info@harveymckibbin.co.uk)

Our address:  
1st Floor, 32 Beeches Walk  
Sutton Coldfield  
West Midlands  
B73 6HN

## Notes

Use this space to ask us any questions about your Will or the **EasyWillPlanner** or if you need to explain any of your entries in more detail.