

# Will-making worksheet

You can use this sheet to help you make your Will. Completing it will provide the details your solicitor needs to help you make a legally binding Will.

# Practical ACTION

## 1. Find out how much you are worth

You can use this worksheet to estimate the value of your estate. Note down the rough value of the things you own (your assets) and things you owe to others (your debts). The balance is your estate – the basis for making your Will.

### What you own

House _____	£ _____
Business and business property _____	£ _____
Other property or land _____	£ _____
Car(s) _____	£ _____
Bank accounts _____	£ _____
Savings _____	£ _____
Stocks and shares _____	£ _____
Insurance policies _____	£ _____
Valuables (eg collections, jewellery, art) _____	£ _____
Money owed to you _____	£ _____
Furnishings and personal effects _____	£ _____
Other _____	£ _____

**Total** \_\_\_\_\_ **£**

### What you owe to others

Items on hire purchase _____	£ _____
Mortgage _____	£ _____
Bank overdraft _____	£ _____
Credit cards _____	£ _____
Outstanding loans _____	£ _____
Other _____	£ _____
_____	£ _____
_____	£ _____
_____	£ _____
_____	£ _____
_____	£ _____
_____	£ _____

**Total** \_\_\_\_\_ **£**

**Balance** (the value of your estate) **£** \_\_\_\_\_

## 2. Decide who gets what

Use this space to note down the people and causes you would like to remember in your Will. Decide what kinds of gift you would like to leave to each person or charity (residual, pecuniary or specific gifts).

Name	Address	Tel	Email	Gift/item/share of estate

Turn over

## ...Continued

Use this space to note down the people and causes you would like to remember in your Will. Decide what kinds of gift you would like to leave to each person or charity: residual, pecuniary or specific gifts (please see page 15 of your Will-making guide for help).

Name	Address	Tel	Email	Gift/item/share of estate
Practical Action	The Robbins Building, 25 Albert Street, Rugby, Warwickshire, CV21 2SD. Reg Charity No. 247257.	0800 389 1624		

## 3 Choose your executor

Who would you like to assign responsibility for carrying out the instructions in your Will? It can be a trusted friend or family member (even if they benefit from your Will), or an appointed service such as a bank, solicitor or accountant.

Name: \_\_\_\_\_ Address: \_\_\_\_\_

Postcode \_\_\_\_\_

Tel: \_\_\_\_\_ Email: \_\_\_\_\_