WILL CHECKLIST

Assets

House		£
Other property		£
Life insurance		£
Bank account(s)		£
Building Society account(s)		£
National Savings/Premium Bonds		£
Stocks and shares		£
ISAs		£
Antiques/collections		£
Foreign assets		£
Money owed to you		£
Furniture/household possessions		£
Other assets		£
	Total	**£**

Liabilities

Outstanding mortgage		£
Loans or HP agreements		£
Credit card balance/s		£
Overdraft/s		£
Outstanding tax		£
Other		£
	Total	**£**

Additional notes

REMEMBER

- Keep your will up to date.
- Keep your will safe.

Beneficiaries

List the family, friends and charities you wish to benefit from your will. You will need to decide what to give each. A percentage share, e.g. 10% of your estate, a specific sum of money or item, e.g. a ring.

Share %	Amount	Specific item	Name	Address

Executors

Decide who to appoint as your executor(s) to carry out your wishes, and ask for their permission. You can appoint up to four and they could be family, friends or a professional, such as your solicitor.

Name	Address

Appointing guardians

Choose guardians for your children, if they are under 18, but discuss this with the potential guardians first.

Name	Address