



Planning a will

A simple worksheet to help you plan your ideas before visiting a solicitor

All of us need to make a will to provide for loved ones after we've gone and to make sure our wishes are carried out. Otherwise, promises you have made may not be carried out, your wishes may be disregarded, and you may leave your loved ones with legal and financial problems to sort out.

Making a will need not be complicated. The following steps will help guide you through the process. Use this will planner to note down key information about your assets and your wishes before visiting a solicitor. Please note that due to different legislation regarding probate, this will planner is not suitable for use in the Channel Islands.

1. Choose the executor

Firstly you need to think about who you would like to administer your will as executor(s). You can nominate a partner, close friend, or a solicitor. People usually choose two executors, but you can have up to four if considered appropriate.

Please note that there is no restriction on an executor being a beneficiary of your will.

2. Guardians for young children

If you have children under 18 (under 16 in Scotland) or pets, it is important to choose and ask a guardian to look after them in the event of your death.

3. What do you own?

Make a note of your assets and calculate their approximate value. The value of your estate will be your assets minus any outstanding money owed e.g. mortgage, loans etc.

4. How do you want to leave it?

Make a note of who you would like to receive your property. There's no limit to the number of different gifts you can make. Once you have provided for your loved ones, you could also consider making a gift to charity to transform the lives of people in need in the future. Even a very small percentage of your estate could make a real difference. Your solicitor or other professional adviser will help you with the wording of your gift, but if you want to leave a gift to Brighter Futures here is an

example of some wording you might use:

For a residuary gift:

I give free of inheritance tax X% of my residuary estate to Brighter Futures, Great Western Hospitals NHS Foundation Trust, Marlborough Road, Swindon, SN3 6AA. Registered Charity Number 1050892 for its general charitable purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors.

For a pecuniary gift:

I give free of inheritance tax £X to Brighter Futures, Great Western Hospitals NHS Foundation Trust, Marlborough Road, Swindon, SN3 6AA. Registered Charity Number 1050892 for its general charitable purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors.

5. Meeting the solicitor

Take this completed will planner with you when you meet your solicitor. Your solicitor will discuss your instructions and advise on how best to word the will. If you do not have an executor, your solicitor can also arrange this for you.

If your estate is large, your solicitor will also advise whether you need to make additional arrangements for tax planning and will advise you of the costs.

6. Approving your will

When drafted, your will should be sent to you to look over for approval. Any changes can be made at this point. Once you are happy with the document, your solicitor will ask you to sign it in the presence of two witnesses at the same time. Please note that beneficiaries cannot witness your will.

7. Keeping your will safe

You can keep your will at home or your solicitor may offer to hold it for you. Don't forget to make sure it is safe and to let your family know where it is.

Simple will planner

Prepare for your meeting with your solicitor by completing this simple checklist

Your name and address	
Your partner's name and address (if different from your own)	
Your executors These are the people who will ensure everything happens. You can have up to four executors. They could be friends or family or a solicitor. Make a note of their full names and addresses.	
Children's full names and addresses (if different from your own)	
Guardian's full name and addresses (if you are appointing a guardian for your child). Remember to discuss your wishes with the people you wish to appoint to make sure they agree. Some people may also have pets they would like someone to take care of.	

Make a list of your assets

In this section below, make a list of everything you own and make a note of its approximate value. This section will help you work out the value of your estate. In the second section, think about what you owe and make a note of your liabilities.

Deduct total B from total A and the result is the total net value of your estate.

What is the value of your major assets £	
Your home (or share in it)	
Other property and land	
Cars and other vehicles	
Home contents including furniture and fittings	
Items of particular value (eg jewellery/art)	
Money in banks and building societies	
Shares, investments, national savings, premium bonds	
Insurance and pensions	
Other savings and assets	
Other savings and assets	
Total assets	

What are your major liabilities? £	
Your mortgage	
Loans and overdrafts	
Your credit cards	
Credit or HP agreements	
Other liabilities	
Total liabilities	

Total assets – total liabilities = total estate value £	
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Who do you want to remember in your will?

Make a list of the family, friends and charities you would like to benefit in your will and think about what you would like them to receive. You will need to decide what you would like to give each person and whether it should be a specific item or amount of money or a % share from your estate.

Name	Address	% Share	Amount £	Specific Item
Brighter Futures, Registered Charity Number 1050892	Marlborough Road, Swindon, SN3 6AA.			

Any Questions?

Now that you have started to think about making your will you may have additional queries. List any questions you might like to discuss with your solicitor on a separate sheet and keep these together with your will planner.

For more information contact us on:

Tel: 01793 605631

Email: gwh.fundraising@nhs.net

Or find out more at: www.brighterfuturesgwh.nhs.uk

Great Western Hospitals NHS Foundation Trust
Charitable Fund (Registered Charity Number 1050892)