

Will Planning Questionnaire

Your Name & Address

Your Partner's Name & Address (If it differs from your own)

Your Executors Name & Address (People who will ensure that everything you want happens. Can have up to 4 executors; they can be friends, family or solicitor.)

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Children's Name & Address (If it differs from your own)

Guardian's Name & Address (If your children are minors & you are appointing a guardian for your children. You may also have pets you wish people to take care of.)

What are your major assets?

Your home (or share in it) (Address)

Other property and land (Address)

Cars and other vehicles (Make & Model)

Items of particular value (eg jewellery/art)

Monies held (Type of Account & Name and Branch of Bank, Building Society, or Safety Deposit Box)

Shares, investments, national savings, premium bonds (Name of Company & Type and Amount of Shares)

Insurance and pensions (Name of Company & Type)

Other savings and assets (Please specify)

Who would you like to provide for?

Family, friends and / or charities that you would like to benefit in your will.

You will need to think about what you would like them to receive; decide what you would like to give each person, organisation or charity and whether it should be a specific item or amount of money or a share of your estate.

Name and address	Share	Amount	Specific item
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