

Before seeing a Professional Advisor

If you complete the following sections before seeking professional advice it will save you both time and money.

A. Choose your executors

Select two people to look after your affairs when you die, asking them first if they are willing to take on this responsibility. Many people choose their main heir as one executor.

1. Name _____
 Address _____

 _____ Postcode _____
 Occupation _____
2. Name _____
 Address _____

 _____ Postcode _____
 Occupation _____

B. Work out what you own

Make a note of all your assets and their approximate *current* value, using the list below.

Personal Property	Approx. Value	Financial	Approx. Value
Your home (market value)	£ _____	Building Society savings	£ _____
Any other property	£ _____	Bank Accounts	£ _____
Household contents		National Savings	£ _____
Furniture & soft furnishing	£ _____	Income/deposit/premium Bonds	£ _____
Paintings & Ornaments	£ _____	Stocks & Shares	£ _____
Antiques	£ _____	Unit Trusts	£ _____
Appliances & equipment	£ _____	Life/Endowment Insurance	
Other	£ _____	(value if you died today)	£ _____
Jewellery	£ _____	Money owed to you	£ _____
Your car (current value)	£ _____	Business Assets	£ _____
Other items of value	£ _____	Other Financial	£ _____

List the names, addresses and account numbers of all bank and building society accounts held:

1. Account Number _____
 Name _____
 Address _____
 _____ Postcode _____
2. Account Number _____
 Name _____
 Address _____
 _____ Postcode _____
3. Account Number _____
 Name _____
 Address _____
 _____ Postcode _____

C. Work out what you owe

Make a list of any outstanding debts you have

Mortgage outstanding	£ _____
Overdraft	£ _____
Other loans	£ _____
Hire Purchase	£ _____
Credit Card balances	£ _____
Unpaid bills	£ _____
Other Liabilities (guarantees and other obligations which do not cease at death)	£ _____

D. Make a note of any money owing to you

Note down the name and address of anyone who owes you money and the amount outstanding.

1. Name _____
Address _____

Postcode _____
Amount outstanding £ _____
2. Name _____
Address _____

Postcode _____
Amount outstanding £ _____

Note down the name and address of any insurance company you have a policy with.

Name _____
Address _____

Postcode _____

E. List your beneficiaries

Write down the names and addresses of all individuals and charities you want to mention in your Will and the type of legacy you would like to leave each one (pecuniary, residuary or specific).

1. Name _____
Address _____

Postcode _____
2. Name _____
Address _____

Postcode _____
3. Name _____
Address _____

Postcode _____

F. Write down any questions you want to ask.

Codicil for Residuary Bequests

By this codicil dated _____
(in words)
to the Will dated _____
(in words)
of me _____
(Your full name)
of _____
(Your full address)

I give to Netherhall Educational Association of 18a Netherhall Gardens, London NW3 5TH,
Registered Charity No. 236586:

(Initials of you and your two witnesses)

) _____
) _____
) _____

All my residuary estate whatsoever and wheresoever after payment of debts, funeral and testamentary expenses and after pecuniary and specific legacies.

(Initials of you and your two witnesses)

) _____
) _____
) _____

A _____
(three quarters, one half, one quarter, etc) share in my residuary estate after payment of debts, funeral and testamentary expenses and after pecuniary and specific legacies and I declare that the remaining part of my residuary estate shall be distributed to the residuary beneficiary named in my said Will and if more than one in the proportions specified

I direct that the receipt of the Treasurer, or other authorised officer for the time shall be sufficient discharge to my executors. In all other respects I confirm my said Will and any previous codicils thereto

Signed by the above named in our joint presence and then by us in the presence of the above named and each other) _____
Testator's signature

Signature of first witness _____ Signature of second witness _____

Name of witness in capitals _____ Name of witness in capitals _____

Address _____ Address _____

Occupation _____ Occupation _____

Codicil for Pecuniary and Specific Bequests

By this codicil dated _____
(in words)
 to the Will dated _____
(in words)
 of me _____
(Your full name)
 of _____
(Your full address)

I give to Netherhall Educational Association of 18a Netherhall Gardens, London NW3 5TH,
 Registered Charity No. 236586:

(Initials of you and your two witnesses)
) _____
) _____
) _____

The sum of £ _____ <i>(in figures)</i> _____ <i>(in words)</i> _____

(Initials of you and your two witnesses)
) _____
) _____
) _____

My _____ _____ _____ _____

I direct that the receipt of the Treasurer, or other authorised officer for the time shall be sufficient discharge to my executors. In all other respects I confirm my said Will and any previous codicils thereto

Signed by the above named in our joint presence and then by us in the presence of the above named and each other) _____
Testator's signature

<i>Signature of first witness</i>	<i>Signature of second witness</i>
<i>Name of witness in capitals</i>	<i>Name of witness in capitals</i>
<i>Address</i>	<i>Address</i>
<i>Occupation</i>	<i>Occupation</i>