



THAMES VALLEY
AIR AMBULANCE

WILL PLANNER

To help you prepare for a meeting with your solicitor

ALL ABOUT YOU

2. You

Full Name:

Date of Birth:

Address:

Telephone Number:

(Home)

(Mobile)

2. Your spouse or partner

Full Name:

Date of Birth:

Address:

Telephone Number:

(Home)

(Mobile)

3. Children

Full Name:

Date of Birth:

Address:

Full Name:

Date of Birth:

Address:

Full Name:

Date of Birth:

Address:

Full Name:

Date of Birth:

Address:

4. Nominated guardians for any children under the age of 18: Remember to discuss your wishes with the people you would like to appoint as guardians, to make sure they agree.

Full Name:	Full Name:
Address:	Address:

YOUR EXECUTORS

These are the people who will ensure that everything happens as directed in your Will. You can have up to four executors and they could be friends, family or a solicitor. Make a note of their full names and addresses.

Full Name:	Full Name:
Address:	Address:
Relationship to you:	Relationship to you:

YOUR ESTATE

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

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

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

A (Total assets) – B (Total liabilities) = Total estate value	£
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WHO WOULD YOU LIKE TO PROVIDE FOR?

Make a list of the family, friends, clubs/societies and charities you would like to benefit in your Will and what you would like them to receive. You will need to decide whether to give them a specific item (such as a piece of jewellery) – known as a specific bequest, a fixed sum of money (a pecuniary bequest), or a share of your estate (a residuary bequest).

Name & Address	% Share	Amount £	Specific Item

OTHER ARRANGEMENTS

What would you like to happen to any of your bequests if the nominated people die before you? Do you have any specific funeral wishes?

You may wish to complete a separate letter of intent, to be kept with your Will, detailing any other information not covered here, such as who might be responsible for looking after your pets when you die, and any passwords or account details for your bank accounts or pensions.

ANY QUESTIONS?

Make a note of any questions you have for your solicitor in the space below so you have them to hand when you meet.