

This Will Planner is to help you prepare for questions a solicitor will ask you, when you make an appointment to create or amend your Will. By thinking about and completing these questions, it will help save time and make the Will-writing process easier. If you're unsure about any of the questions, make sure you discuss them with your solicitor who will be able to assist you.

1. You

Full Name:

Address:.....

.....

.....

Date of birth/...../.....

Telephone No. (Home) Mobile:

Marital Status:

Single Divorced Engaged Remarried Married Widowed Separated

2. Your spouse or partner

Full Name:

Address:.....

.....

.....

Date of birth/...../.....

Telephone No. (Home) Mobile:

Marital Status:

Single Divorced Engaged Remarried Married Widowed Separated

3. Your children

Name	Address	Date of Birth	Status*

*Whether the child is from this relationship, a previous relationship or other circumstances.

4. Do you have an existing will?

You: Yes No Spouse or partner: Yes No

5. Nominated guardians for any children yet to reach adulthood

Full Name	Address

6. Do you have particular funeral wishes?

7. The value of your estate

This section helps you work out the value of your estate.

The value of your major assets

Your home (or your share in it) £.....

Other property or land £.....

Cars and other vehicles £.....

Home contents including furniture and fittings £.....

Items of particular value (e.g. jewellery or art) £.....

Money in banks and building societies £.....

Shares, investments, National Savings, Premium Bonds £.....

Insurance and pensions £.....

Other savings and assets £.....

Total Assets £.....

Your major liabilities

Your mortgage £.....

Loans and overdrafts £.....

Credit cards £.....

Credit or hire purchase agreements £.....

Other Liabilities £.....

Total Liabilities £.....

Assets less liabilities = estate value £.....

8. Bequests

Specific items e.g. cars, ornaments, jewellery. List the names and addresses of individuals and organisations, like the Liberal Democrats, to whom you would like to make a specific gift.

Full Name	Address	Description of gift

Pecuniary bequests (set amounts of money). List the names and address of individuals and organisations, including the Liberal Democrats, to whom you would like to leave a specific sum of money.

Full Name	Address	Amount %

Residuary bequests (a percentage or all of the remainder of your estate). List the names and addresses of individuals and organisations, including the Liberal Democrats, to whom you would like to leave a proportion of your estate.

Full Name	Address	Amount %

9. Choice of Executors

It is common to appoint a trusted family member or friend. A solicitor can also act as an Executor but please note there is normally a charge for this service.

Name of Executors: (1)
(2)

Address of Executors: (1)
.....
.....

(2)
.....
.....

Relationship to you: (1)
(2)

Making a Will is essential, enabling you to set down what you want to happen to your belongings and property after you are no longer here. A Will is also helpful to your family and friends in the aftermath of your passing.

But it's also an opportunity to do something lasting for your party, our country, and the future of liberalism. Your legacy donation ensures we can continue to stand for, and deliver, the kind of politics and policies you have believed in all your life.

It doesn't matter how much you choose to leave in your Will – any amount, however large or small, helps put more Liberal Democrats into every level of government.

The next generation of Liberal Democrats will face some of the biggest challenges in living memory – your legacy will live on through their hard work.