

Will Planner

Writing a Will is a simple way to make sure your wishes are carried out – it gives you and your loved ones peace of mind about the future.

This will planner is designed to help you prepare for the types of questions you'll get asked when you write your Will. Thinking about these questions before you begin will help the Will writing process run smoothly.

About you

Full name	
Date of birth	
Address	
Postcode	
Telephone number	
Marital status	Single / Divorced / Married / Widowed / Separated / Civil Partnership / Married / Co-habiting and unmarried / Other

About your spouse or partner (if relevant)

Full name	
Date of birth	
Address	
Postcode	

About your children (if relevant)

Full name	Date of birth	Address

Care for the Carers

Faraday House

1 Faraday Close

Eastbourne

BN22 9BH

tel: 01323 738390

email: info@cftc.org.uk

Registered charity number: 1074906 Registered Company No:3677361.

Existing Wills

Do you have an existing Will? Yes ☐ No ☐

Does your spouse or partner (if relevant) have an existing Will? Yes ☐ No ☐

Nominated guardians (if relevant)

For any child yet to reach adulthood.

Full name	Address

Your executors

Who will make sure the wishes detailed in your Will are carried out.

Full name	Address

Your estate

What will you'll leave behind.

Assets	Value	Liabilities	Value
Home and any other land	£	Mortgages	£
Car (or other vehicle)	£	Loans and overdrafts	£
Home contents including furniture and fittings	£	Credit cards	£
Items of particular value (e.g. jewellery, antiques, etc.)	£	Other	£
Savings in banks or building societies	£	Total	
Shares / Investments / Premium Bonds, etc.	£		
Insurance policies	£		
Pensions	£		
Other			
Total	£		
Assets – Liabilities = Total estate value			

Your digital assets

We all have increasing amounts of assets stored online; email and Facebook accounts, passwords for online accounts, digital music and photos. It's a good idea to think about who you'd like to pass on these assets to as well.

Full name	Address

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Your gifts

Use this section to plan who you'd like to benefit in your Will. You'll need to decide what you'd like to give each person or charity named in your Will. You can give a specific item, such as a family heirloom ("specific bequest"), a fixed cash amount ("pecuniary bequest"), and/or a percentage of your estate ("residuary bequest"). A residuary bequest is calculated after specific and pecuniary bequests have been taken into account.

People

Full name	Address	% share	Fixed amount	Specific item(s)
		____ %	£	
		____ %	£	
		____ %	£	
		____ %	£	
		____ %	£	
		____ %	£	

If any of the people mentioned do not survive you, what would you like to happen to their gifts?

A gift in your Will is the greatest gift you can give.
So, once you've taken care of your loved ones, please consider leaving a gift in your Will to Care for the Carers.

Charities

Charity name and number	Address	% share	Fixed amount	Specific items
		_____%	£	
		_____%	£	
		_____%	£	
		_____%	£	
		_____%	£	

Support for you

If you have any questions about how to leave a gift in your Will to our work please contact our Fundraising Manager, Amy, on 01323 738390 ext 404 or email amyh@cftc.org.uk

For more information visit www.cftc.org.uk/giftsinwills