

## Asset checklist

There are three important topics to consider ahead of making or changing your will;

- the assets that you can gift in your will
- who to include in your will
- who will be your executor(s) (and legal guardian(s) if you have children aged under-18)

This checklist aims to help you to address those three topics. The checklist is for your use. We suggest that you keep the detail to yourself.

## The assets that you can gift in your Will

It is important when you make or change your will to have a clear idea of what your estate is worth. The checklist will help give you an idea of the value of your estate and will save time with your solicitor.

### Everything I own – your assets (current value)

- House (£):
- Furniture (£):
- Antiques (£):
- Collectables (£):
- Car (£):
- Jewellery (£):
- Bank accounts (current balance):
- Building society (current balance):
- ISAs/Premium Bonds (£):
- Stocks and shares (£):
- Life assurance policies (£):
- Money owed to me (£):
- By whom:
- Other possessions (£):
- Total assets (£):

### Everything I owe – your liabilities

- Mortgage – outstanding balance (£):
- Loans (£)
- Overdrafts (£):
- Credit card debt (£):
- Other debt (£):
- Total liabilities (£):

Total Assets less Total Liabilities (£):

## Who to include in the will

Decide who you want to remember in your will – people, causes and organisations. And consider the types of gifts you might want to leave them.

### Family

Name	Share of Estate	Specific Sum	Specific Item
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### Friends

Name	Share of Estate	Specific Sum	Specific Item
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### Charities/organisations

Name	Share of Estate	Specific Sum	Specific Item
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## Who will be your executor(s)

Who will be your executors and who will be the legal guardians if your children are aged under eighteen?

### Executor(s)

Name	Address	Postcode Contact	Telephone
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### Legal guardian(s) if you have children U18

Name	Address	Postcode Contact	Telephone
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