



# Will Planner



Prepare for your meeting with your solicitor by completing this Will Planner and taking it along with you.

## YOUR PERSONAL DETAILS

Important: This Will Planner cannot be used as a valid Will

Your name and address:

Your partner's name and address: (if different from your own)

Executors\*\* full names and addresses:

Children's full names and addresses: (if different from your own)

Guardians\*\* full names and addresses:

## VALUE OF YOUR ESTATE

Use these tables to help work out the value of your estate

### What is the value of your major assets?

Your home (or 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	£
<b>Total assets:</b>	£

### What are your major liabilities?

Your mortgage	£
Loans and overdrafts	£
Your credit cards	£
Credit or hire purchase (HP) agreements	£
Other liabilities	£
<b>Total liabilities:</b>	£

**Assets less Liabilities = Total Estate Value** £

\*See definitions of legal terms on the last page of this Will Planner



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## BEQUESTS

**Make a note of any specific gifts you want to leave**

**Specific Bequests (item):** Write down the full names and addresses of all individuals and charities (with registered charity numbers) you want to benefit, with a brief description of the item.

**Pecuniary Bequests (set amount of money):** Write down in full the names and addresses of all individuals and charities (with registered charity numbers) you want to benefit and the amount.

**Residuary Bequests (a percentage or all of the residue of your estate):** Write down the full names and addresses of all individuals and charities (with registered charity numbers), with their proportion of the residue of your estate.

**What do you want to happen to your bequests if any of your beneficiaries die before you do?**

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On a separate sheet, please list any questions you may have for your solicitor and keep it with your Will Planner in a safe place

## A GIFT TO CHARITY

When making or amending a Will, many people like to take the opportunity to include a gift to a charity close to their hearts.

This year marks our 30th anniversary of providing free specialist palliative and end of life care for the people of Barnsley when they need it most. As a charity, we rely on income generated through Gifts in Wills and other fundraising opportunities to help us fund our services. With your support, we can make a difference

There is no obligation to leave a gift to Barnsley Hospice in your Will, but we hope this is something you'll consider to help us to fund our vital services for local people.

### Our Details

If you choose to leave a gift for Barnsley Hospice in your Will, here, are the details your Solicitor will need.

**Name of Charity:** Barnsley Hospice

**Address:** 104 – 106 Church Street, Gawber, Barnsley, S75 2RL

**Registered Charity Number:** 700586





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## LEGAL TERMS

### Glossary of words you might need to know when making your Will:

#### An Administrator

is someone who is appointed by law to settle your affair if you die with no Will.

#### Beneficiary

is anyone who receives something from a Will.

#### A Bequest (Legacy)

is a gift left in a Will. It can be:

1. **Specific:** a definite object or property
2. **Pecuniary:** a gift of a particular sum of money
3. **Residuary:** a gift of money or assets left when your legacies and expenses have been paid. It is normally expressed as a part or percentage of the residue of your estate.

#### A Codicil

is an addition or amendment to an existing Will.

#### Your Estate

is the total value of everything you own at your death, less any outstanding commitments.

#### An Executor

is the person or people you choose to make your Will happen. They can be a relative, a friend or your solicitor.

#### Guardians

are the people chosen by parents to look after their children in the event of their death.

#### Intestacy

is the name for the situation which arises when someone dies without making a Will.

#### Inheritance Tax

is a 40% tax deducted from estates with a value more than £325,000. Money left to your spouse or a charity is not taxed. If your spouse pre-deceased you and did not use up their full inheritance tax-free allowance, this will be added to your own at the rate prevailing at your death.

#### Probate

is the legal process to establish whether your Will is valid. If not, an administrator is appointed.

#### A Testator/ Testatrix

is the person making the Will.

#### A Trust

is an arrangement you can make in your Will to administer part of your assets after your death.

Barnsley Hospice  
104 -106 Church Street, Gawber, Barnsley, S75 2RL  
Registered Charity No. 700586  
Telephone: 01226 244244  
Email: [enquiries@barnsley-hospice.org](mailto:enquiries@barnsley-hospice.org)  
[www.barnsleyhospice.org](http://www.barnsleyhospice.org)

