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The Big Give Will Planner

Your Will is one of the most important documents you will ever write, but it needn't be complicated. Alongside advice from your legal advisor, this brief guide will help you ensure your wishes are carried out. Fill in the relevant sections, take it along with you to your legal advisor and hopefully it will help you save both time and money.

1) Use our checklist below to work out the value of your estate and make a list of your assets and liabilities.

My Assets (everything I own)

Property:

Your home and any other property £ _____

Possessions:

Your car £ _____

Furniture £ _____

Other household effects (pictures, books, silver, antiques) £ _____

Jewellery and other individual items £ _____

Financial:

Cash in your bank/building society account £ _____

National Savings/other savings schemes £ _____

Stocks, shares, bonds, investment trusts £ _____

Insurance policies £ _____

Pension death benefits £ _____

Other savings and cash £ _____

Total Assets: £ _____

My Liabilities (everything I owe)

Mortgage (current outstanding balance)	£_____
Bank Loans	£_____
Overdraft	£_____
Hire Purchase Agreements	£_____
Credit Card Debts	£_____
Any other debts	£_____
Total Liabilities:	£_____

To find out the full value of your estate, subtract the liabilities subtotal from the assets subtotal.

TOTAL ASSETS	£_____
minus	
TOTAL LIABILITES	£_____
equals	
TOTAL VALUE OF ESTATE	£_____

This checklist will also help you to assess if you need further advice on inheritance tax planning if your total estate is above the tax threshold. Currently, if your estate is worth over £325,000 you may need to take steps to reduce your liability to tax however this changes from year to year depending on the budget. Your solicitor or will writer will be able to advise you on this.

2) Make a list of charities you want to benefit from your will.

After you have secured the future of your immediate family, make a list of the charities you would like to benefit and what you would like them to receive. Make very clear whether you intend your gift for the national body, or a local or regional branch if that structure exists.

I _____ (name) of _____
_____ (address)

(a) MS RESEARCH (charity name) of MS RESEARCH TREATMENT AND EDUCATION,
THE VASSALL CENTRE, GILL AVENUE, BRISTOL, BS16 2QQ (charity address)

Registered charity number 1043280 the sum of £_____ , and/or
_____ (a specific item)

(b) _____ (charity name) of _____
_____ (charity address)

Registered charity number _____ the sum of £ _____ , and/or
_____ (a specific item)

(c) _____ (charity name) of _____
_____ (charity address)

Registered charity number _____ the sum of £ _____ , and/or
_____ (a specific item)

3) Decide what type of legacy you want to leave.

Ask your legal advisor to use the wording below when writing your gift into your Will.

- A specific sum (pecuniary bequest):

I give to (charity name) of (charity address), (registered charity number) absolutely the sum (amount in figures, amount in words) to be applied by (charity name) for its general charitable purposes, and I declare that the receipt of the Honorary Treasurer or other any other proper officer for the time being shall be a good discharge to my executors.

- For a specific item (conditional bequest):

I give to (charity name) of (charity address), (registered charity number) absolutely, (write here whatever you wish to give) to be applied by (charity name) for its charitable purposes, and I declare that the receipt of the Hon. treasurer or any other proper officer for the time being shall be a good discharge to my executors.

4) What happens if any of your beneficiaries die before you?

What do you want to happen to your estate - would you like to leave it to charity? make a note below:

5) Choose your executors.

These are the people who will take care of your estate after your death. You can choose up to four people, who can be family, friends, your solicitor or sometimes even your charity. Whoever you choose make sure you ask their permission. Make a note of their names and addresses below:

6) Choose 2 witnesses to sign your Will.

To be legally binding your will must be signed in the presence of 2 witnesses who must then sign it themselves. Neither they nor their spouses must be beneficiaries of the Will.

7) Choose a solicitor.

We recommend that you use a solicitor or professional will writer to write your Will. If you don't already have one, you can ask a friend or relative to recommend one, or you can search online via the Law Society at www.solicitors-online.com or contact the Society for Trust and Estate practitioners on 0207 838 4885.

8) Will Aid.

You might also want to consider using Will Aid - A charity Will making scheme which takes place in November every 2 years. If you choose to use this scheme, instead of the solicitor taking your fee it is donated to one of the 9 participating charities. However you can still leave a legacy in your will to any charity of your choice. For more information about Will Aid and to find your local Will Aid solicitor please visit www.willaid.org.