

MAKING A WILL

What information do I need to prepare?

TICK

- Any existing will
- Power of attorney
- Contact details for previous solicitor (if different)

A full list of names and addresses for:

- Your partner, spouse, or civil partner
- Children
- Your executor(s) – please speak with them first.
- Your chosen guardians for any children.

Details of your assets, including:

- Your home and any other property or land.
- Vehicle(s)
- Money in bank and savings accounts
- Investments
- Pension scheme(s)
- Art, jewellery, antiques, and other valuables
- Digital assets
- Property or assets overseas

Details of your debts and liabilities

- Mortgage(s)
- Loans
- Hire purchase agreements.

Details of business assets

- Company information
- Ownership details
- Websites, domains
- Intellectual property – patents, trademarks, designs, copyright

Contact details for your beneficiaries and details of what you would like them to receive

- Family
- Friends
- Charities
- Other

Other issues of importance

- Funeral arrangements
- Tax planning
- Unusual or contentious wishes