



National Animal Welfare Trust

Charity No 1090499

An Aid to Drafting Your Will

This form has been written to help you think about your Will before you meet with your solicitor. By filling in as much as you can before you meet your solicitor, you should be well prepared for the meeting. By reducing the time you spend with your solicitor, and the possible need for further meetings, you could save on your bill too.

Please include full names and addresses whenever possible.

NB this form cannot be a Will in its own right. It should however help speed up the process of Will-making.

(1)

Your personal details

Full name:

Address:

Postcode:

(2)

What are your assets worth?

If you have any individual items that are particularly valuable, you might want to consider leaving a separate note identifying these and any valuations you have with your Will.

YOUR ASSETS (or what you own)

VALUE IN £s

YOUR LIABILITIES (or what you owe)

VALUE IN £s

Your home:	£	Your outstanding mortgage:	£
Other properties or land:	£	Any credit or HP agreements:	£
Cars or other vehicles:	£	Any loans or overdrafts:	£
Home contents: Furniture and fittings, TV and video, artefacts, electrical, cameras, leisure equipment and books	£	Outstanding credit card balance:	£
Valuable Items: Like jewellery and paintings	£	Other:	£
Funds in Banks & Building Societies:	£		£

Shares and Investments:	£		£
Insurance and Pensions:	£		£
Other savings and assets	£		£
TOTAL VALUE OF ASSETS: a)	£	YOUR TOAL LIABILITIES: b)	£
		YOUR TOTAL ASSETS, LESS LIABILITIES:	£

(3)

Is this your first Will?

If you have previously made a Will, be sure to take it with you when you meet with your solicitor. Also take any other documents that you think may be relevant.

(4)

Select your Executors

You can choose up to four people, although two is more usual. It is their job to ensure that your wishes are carried out. It is important to remember that at least one of them will survive you. If you wish, you can ask your solicitor to be one of your Executors but, if they accept, they will charge for their time and deduct it from your estate. (Please remember the Chief Executive of the National Animal Welfare Trust will be pleased to act as your Executor).

Full Name:

Address:

Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

(5)

Do you have young children?

If you do, you should consider appointing a guardian and naming them in your Will. (This is just a sensible precaution in case you die before they reach the age of 18.)

Full Name:

Address:

Postcode: Telephone:

Full Name:

Address:

Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

(6)

Pecuniary legacies

Make a note below of any sums that you want to leave to family/friends and/or charities (these are known as pecuniary legacies). Alternatively, you could leave all of (or a proportion of) the remainder of your estate to charity after your loved ones have been looked after (see section 8).

Beneficiary Amount

Full Name:

Address:

Postcode Telephone

Beneficiary Amount

Full Name:

Address:

Postcode Telephone

If necessary, continue your list on a separate sheet of paper.

(7)

Specific legacies

List below any specific items that you wish to leave family, friends or charities together with a brief description of each item (these are known as specific legacies).

Beneficiary Amount

Full Name:

Address:

Postcode Telephone

Beneficiary Amount

Full Name:

Address:

Postcode Telephone

If necessary, continue your list on a separate sheet of paper.

(8)

Residue of Estate

List here, the people and/or charities that you would like to share the remainder of your Estate between, after all the legacies already listed have been distributed. This remaining part of your Estate is called the residue. Residuary Bequests have the great advantage of keeping pace with inflation and are the very best way for you to help the National Animal Welfare Trust and its work.

Beneficiary **Amount**

Full Name:

Address:

Postcode Telephone

Beneficiary **Amount**

Full Name:

Address:

Postcode Telephone

If necessary, continue your list on a separate sheet of paper.

(9)

What do you want to happen to your Estate if any of the people you have named as beneficiaries of your Will die before you?

If necessary, continue your list on a separate sheet of paper.

(10)

Do you and your family often travel together?

In the unlikely event that you were to die together, what do you want to happen to your Estate?

