



solicitor checklist

securing the future together

Below is a checklist of the things you may need to consider before meeting your solicitor:

Information about You

- Your full name _____
- Any former name(s) or alias(es) _____
- Address _____

- Date of birth (for purposes of tax and investment advice) _____
- Married / co-habiting / civil partner _____
- Children / step children _____

Names of Executors / Trustees

Full names and addresses of proposed Executors and Trustees

_____	_____
_____	_____
_____	_____
_____	_____

Details of any Guardians appointed to look after your children

If you have children under 18 you may wish to choose a guardian willing to take on parental responsibility. You must obtain permission from your named guardian before including them.

Names and addresses _____

Details of who you wish to look after your pets

You must ask anyone you name here

Names and addresses _____

Value Of Your Property

To establish this, you'll need details of the following;

What you own

Property or share of property

Main home £ _____

Second home £ _____

Holiday / investment property £ _____

Savings

Bank accounts £ _____

Building societies £ _____

ISA / National savings £ _____

Investments

Stocks and shares £ _____

PEP's, Unit or Investment Trusts £ _____

Shares in private companies £ _____

Insurance

Life assurance £ _____

Endowments £ _____

Personal possessions Furniture, jewellery, car etc £ _____

Total assets £ _____

What you owe

Mortgage £ _____ Hire purchase £ _____

Bank loans £ _____ Credit cards £ _____

Overdraft £ _____ Other £ _____

Total liabilities £ _____

Minus what you owe from what you own to find the rough net value of your estate

Total assets £ _____

Total liabilities £ _____

Value of your estate £ _____

Deciding who you would like to remember

1: Name and contact details _____

What you want to leave them _____

Is it a pecuniary, specific or residual gift? _____

2: Name and contact details _____

What you want to leave them _____

Is it a pecuniary, specific or residual gift? _____

3: Name and contact details _____

What you want to leave them _____

Is it a pecuniary, specific or residual gift? _____

(Please continue on a separate sheet if necessary)

Residuary estate

This is what is left after you have remembered your loved ones, and taxes and funeral expenses have been paid. You may wish to leave a residuary gift in your Will to a favourite charity.

Who you wish to remember _____

Share of your estate _____

Address of beneficiary _____

Alternative Beneficiaries

These are beneficiaries you may wish to remember if your first beneficiary dies before your death. You may wish to remember a charity as an alternative beneficiary.

Name and contact details _____
