



8. Please state if you have any particular funeral wishes
9. Do you have any pets that may need to be taken care of?
10. If you have previously made a will, please say when and who is storing the original document?
11. Please list details of any lifetime gifts you have made of more than £5,000 in value on any one occasion.
12. Approximate value of your assets – if owned jointly you need to put in the “Your Share” column the amount of your share, eg 1/2 share or 1/3 share.  
Please list items such as your house, car, share of any business, furniture, bonds, savings and investments, any shares, ISA’s, life policy amounts due when you die, savings certificates, jewellery etc., and any debts owed to you. Use an extra sheet of paper if you need to:

<b>Items</b>	<b>Total Value</b>	<b>Your Share</b>	<b>Owned with Whom?</b>
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13. Do you owe money on mortgages, overdrafts, loans or other debts? If so, please list the details. If any of the debts are owed jointly with another person, please do fill in the details asked for:

<b>Name of Creditor</b>	<b>Amount Owing</b>	<b>If a joint debt, your share of it</b>	<b>Name of Joint Debtor (if appropriate)</b>	<b>When repayment is scheduled (if known)</b>
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14. Please tick to indicate the total value of your property, including the value of your share of any jointly owned property:
- (a) Up to £100,000 [  ]                      (b) £100,000 to £250,000 [  ]                      (c) £250,000 to £400,000 [  ]  
(d) £400,000 to £650,000 [  ]                      (e) Over £650,000 [  ]                      (f) Over £1,000,000 [  ]

15. Please specify any gifts of things or money you want to make to family and others:

Individuals

Charities

16. For the rest of your estate, who do you want to benefit? Write down your wishes as best you can.

17. Last but not least, who will be the executors of your will? This can be a surviving wife/husband etc., or other beneficiaries.

**Note about jointly owned assets:**

Your will cannot deal with many jointly owned assets unless action is taken.

If you jointly own a property as "*joint tenants*" then the survivor will inherit the half of the first to die. This may be true of your house or other property and jointly owned investments.

If this applies, by changing the basis of ownership to "non-joint tenants" you can then leave your personal share to someone else. That could be the other joint owner or someone else entirely.