

Gifts

Use this section to plan who you would like to be a beneficiary of your Will. You will need to decide what you would like to give each person or charity named in your will. You can give a specific item, for example, a family heirloom (this is known as a specific bequest), you can give a fixed cash amount (a pecuniary bequest) or a percentage of your estate (a residuary bequest) calculated after specific bequests and pecuniary bequests have been taken into account.

Name	Address	% share	Fixed amount	Specific item
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	
		%	£	

If any of the people you have mentioned do not survive you, what would you like to happen to their gifts?

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An easy way to prepare for your meeting with your solicitor.

Will planner

Before meeting with your solicitor to make your Will it's good to have an idea of what you own and who you want to benefit. Once you have looked after your family and friends you may decide you want to leave a gift to a charity to impact a cause you care about even after you have gone.

Please note that this planner is not a legal document.

Our promise to you

We're a charity with a personal touch. Heart Research UK promises to:

- Respect your privacy
- Understand that family and loved ones come first
- Not pester you, you don't have to let us know we are in your Will
- Only contact you if and how you want to be contacted
- We treat people as we would want to be treated ourselves.

That's why we understand that circumstances change and you may end up changing your Will.

Your partner's name and address:

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..... Postcode

Children's full names and addresses:

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If you have children who are under 18, who would you like to be their guardian (with legal responsibility for them until they turn 18)?

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Executors' full names and addresses:

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Funeral instructions

Let your executors know your wishes for your funeral (e.g. whether you'd like to be buried or cremated; whether you'd prefer a collection for charity instead of flowers).

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On a separate sheet of paper, make a list of any questions that you may want to ask your solicitor and keep it with this planner. **Please note that this Will Planner cannot be used as a valid Will.**

Your estate

Use this section to calculate how much your estate is worth.

Assets	Value	Liabilities	Value
Home and any other property or land	£	Mortgages	£
Car (or other vehicle)	£	Loans and overdrafts	£
Home contents, including furniture and fittings	£	Credit cards	£
Items of particular value (e.g. jewellery, antiques)	£	Other	£
Savings in banks and building societies	£		
Shares/investments/Premium Bonds, etc.	£		
Insurance policies	£		
Pensions	£		
Other	£		
Total	£	Total	£
Assets – Liabilities = Total Estate Value	£		