Will Checklist

Created: 12/26/2011

# Tasks:

☐ **Information about Yourself**

☐ **Your full name.**

☐ **Any former name(s) or alias(es).**

☐ **Address.**

☐ **Age**

*For the purposes of tax and investment advice.*

☐ **Marital Status.**

*Married/co-habiting/civil partner*

☐ **Children.**

*Or step children*

☐ **Value Of Your Property**

☐ **Property**

*Any property owned in your sole name, including house, bank accounts, society security, saving certificates, shares, car, etc.*

☐ **House**

*Details of any house owned with another in joint names.*

☐ **Bank info**

*Details of bank/building society accounts or other property owned with another in joint names.*

☐ **Superannuation benefits**

*And whether they are nominated.*

☐ **Insurance policies**

*Including whether or not you have instructed the Insurance Company to benefit a particular person on your death.*

☐ **Trust property.**

☐ **Foreign property.**

☐ **Property likely to be inherited.**

☐ **Gift**

*Especially if you have made any substantial gifts within the last seven years. This information is needed for Inheritance Tax purposes.*

☐ **Mortgage**

*Whether your property mortgaged and whether you have any other substantial debts.*

☐ **Business/Agricultural property.**

☐ **Names of intended Beneficiaries**

☐ **Spouse - full name.**

☐ **Children - names and ages.**

☐ **Others - names/addresses.**

☐ **Details of any gifts you want to make**

☐ **Personal belongings**

*Do you want to give any special items to named beneficiaries.*

☐ **Legacies**

*Do you want to make gifts of cash to friends or charities.*

☐ **Who is to receive the rest of your property?**

☐ **Other Information**

☐ **Full names and addresses of proposed Executors and Trustees.**

☐ **Names and addresses of any Guardians appointed to look after your children**

☐ **Your wishes with regard to the body and any funeral arrangements.**