

Will Checklist

By Kimberly French

- 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.