

WILL WRITING CHECKLIST

The comprehensive guide to
get you started



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Step 1: Value Your Estate

A partial intestacy arises where the Will fails to cover all of your property so it is essential that your Will covers your whole estate. A good way of understanding the nature and extent of your estate is to draw up a list of your assets and liabilities.

Typical assets that make an estate include:

1. Your home and any other property you own
2. Bank and building society accounts savings
3. National Savings (including premium bonds)
4. Insurance (e.g. life assurance or an endowment policy)
5. Pension funds which include a lump-sum payment on death
6. Motor vehicles
7. Jewellery, antiques and other personal belongings
8. Money you are owed from another
9. Furniture and other household contents

Typical debts may include:

1. Mortgage or equity release
2. Credit card balance
3. Bank overdraft
4. Loans

Step 2: Decide How Your Estate is to be Distributed

It is important to consider who you may be expected to make provision for and make absolutely clear who you wish to benefit on your death.

- Do you want to make specific gifts of **property**?
- Do you want to make gifts of **money**?
- What is to happen to the **residue** of your estate (this is all your property or money remaining after paying funeral and administrative expenses, legacies and taxes)?
- Who do you want to benefit if any beneficiaries were to **die before you**?
- Do you want to make any gifts to **charities**?

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Step 3: Choose Your Executors

Executors are the people who will deal with distributing your estate after your death.

Being an executor can involve a lot of work and responsibility, so it is important to consider your appointment carefully.

Options can include family, friends or even professional persons (however, do bear in mind that professional executors can charge for their time and work).



Step 4: Write Your Will

There are a number of ways in which you can write your Will.

You can write your Will:

- with the help of a solicitor or professional Will writer (which is always preferred)
- by yourself (whether using an online or store-bought template)
- with a charity
- with your bank.

Get started online [now](#).

Step 5: Sign Your Will

A written Will is not legally valid, unless it is signed correctly.

You must sign your Will in the presence of two independent witnesses who each also sign the Will in your presence.

There are further legal requirements regarding who you choose as your witnesses, to ensure the validity of gifts in your Will.

Talk to us today to learn more on
01865 507174.

Step 6: Store Your Will

Any Will which is known to exist but cannot be located on death is presumed to have been effectively destroyed and revoked.

As such, it is paramount that you keep your Will safe.

When you write your Will with us, we can register your Will with Certainty, The National Will Register, for **just £10 per Will**.

We will also store your Will **for free** on our secure servers.

Your Will can be more easily located and followed.

Call us today on
01865 507174

or email
info@adewills.co.uk