A.D.E WILLS · ESTATE PLANNING, OXFORD

The Will Writing Checklist

Safe to do business with
Code Compliant

Everything worth gathering before your appointment — in one place, on paper.

Print this out and fill in whatever you can. **You don't need to complete it all**, and nothing here is binding — it's simply a way of getting your thoughts in order so your appointment is unhurried and nothing important gets forgotten. Rough figures are fine. If a section doesn't apply to you, skip it. If you're not sure about something, leave it blank and ask us on the day — that's exactly what we're here for.

01 You

as your name appears on official documents

FULL NAME

DATE OF BIRTH

HOME ADDRESS, INCLUDING POSTCODE

TELEPHONE

EMAIL

MARITAL STATUS

☐ Single ☐ Married ☐ Civil partnership ☐ Living with a partner ☐ Divorced ☐ Widowed ☐ Separated

PARTNER OR SPOUSE'S FULL NAME (IF APPLICABLE)

ARE YOU MAKING WILLS TOGETHER?

02 Your family

children, stepchildren and anyone who depends on you

FULL NAME	RELATIONSHIP TO YOU	AGE	ADDRESS, IF NOT LIVING WITH YOU

IF ANYONE LISTED IS UNDER 18

You'll want to name **guardians** — the people you'd choose to bring them up if you and their other parent weren't able to. There's space for that in section 07. It's the single most important reason younger families make a Will, so do give it some thought before your appointment, and ideally have a word with whoever you have in mind.

03 What you own

rough figures are fine — no need to look anything up

DETAILS	ROUGHLY WORTH	JOINT	SOLE
Property		☐	☐
Savings & current accounts		☐	☐
Investments & shares		☐	☐
Pensions		☐	☐
Life insurance		☐	☐
Business interests		☐	☐
Vehicles		☐	☐
Valuables & heirlooms		☐	☐
Digital assets		☐	☐
Overseas assets		☐	☐
		☐	☐

AND WHAT YOU OWE

DETAILS	ROUGHLY OWING
Mortgage or equity release	
Loans & credit cards	
Overdraft	
Anything else	

WHY WE ASK

Knowing roughly what makes up your estate helps us make sure your Will covers *all* of it. If a Will leaves part of an estate unaccounted for, that part falls back into the intestacy rules — which is exactly what making a Will is meant to prevent. Knowing what's held jointly matters too, because jointly owned assets often pass automatically to the other owner rather than under your Will.

04 Documents worth digging out

gather what's easy — ask us about the rest on the day

A few pieces of paperwork tell us things we can't work out on our own — particularly how your property is owned, and whether a pension or policy already has someone named on it. **Bring what you can lay hands on easily.** Anything you can't find, we'll sort out together.

- ☐ **Your current Will**, if you have one — please bring the original if you can.
- ☐ **Property title register or deeds** — *especially important if you own the property with someone else, as the type of joint ownership changes how your share can pass.*

PENSIONS — ONE ROW EACH

Tick whether a beneficiary is already nominated on each one.

WHO IT'S HELD WITH	ANY PAYOUT ON DEATH, AND ROUGHLY HOW MUCH	YES	NO	NOT SURE
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

LIFE ASSURANCE — ONE ROW EACH

Tick whether the policy is written into trust with the provider.

WHO IT'S HELD WITH	TYPE OF COVER AND VALUE	YES	NO	NOT SURE
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

PRIVATE LIMITED COMPANIES YOU HOLD SHARES IN

COMPANY NAME	ROUGHLY WHAT SHARE YOU HOLD

WHY THESE THREE IN PARTICULAR

Pensions and life policies often pass *outside* your Will — straight to whoever is named on them, or to a trust — so knowing what's already nominated stops your Will and your policies pulling in different directions. And company shares can carry restrictions on who you're allowed to pass them to, which we'll check for you.

05 Who gets what

particular things, to particular people

ITEM, KEEPSAKE OR SUM OF MONEY	WHO SHOULD RECEIVE IT	SECOND CHOICE, IF NEEDED

A second choice simply covers the possibility that someone isn't able to receive their gift when the time comes. Leave it blank if you'd rather talk it through with us.

CHARITABLE GIFTS

CHARITY NAME AND NUMBER, IF YOU KNOW IT	AMOUNT OR SHARE	ANY PARTICULAR PURPOSE

06 Everything else — the residue

the most important part of your Will

Once the gifts above, your debts, funeral costs and any tax have been settled, everything remaining is called the **residue** — usually the largest part of an estate. Who should receive it, and in what shares?

NAME	SHARE (%)	SECOND CHOICE, IF NEEDED

Shares should add up to 100%. Don't worry if yours don't yet — we'll work it through together.

07 Your people

please do ask them first — they can decline

ROLE	FULL NAME	RELATIONSHIP TO YOU	ADDRESS
Executor 1			
Executor 2			
Executor 3 or back-up			
Guardian 1			
Guardian 2 or back-up			
Trustee, if different			

Most people appoint two executors, and you can name up to four. It's perfectly normal for an executor to also be a beneficiary — most people choose someone close to them. Guardians are only needed if you have children under 18.

08 Your wishes

not legally binding, but a real comfort to your family

FUNERAL PREFERENCES

☐ Burial ☐ Cremation ☐ No strong preference ☐ I've made arrangements already

ANYTHING YOU'D LIKE THE DAY TO INCLUDE — MUSIC, READINGS, A PLACE, A WISH ABOUT FLOWERS OR DONATIONS

ORGAN AND TISSUE DONATION

☐ I'm registered as a donor ☐ I'd like to be ☐ I'd rather not ☐ Undecided

YOUR PETS

WHO YOU'D LIKE TO TAKE THEM ON — A PERSON OR AN ANIMAL CHARITY

A LETTER OF WISHES

A private letter kept alongside your Will — for smaller sentimental gifts, guidance for your guardians, or the reasoning behind a difficult decision.

☐ I'd like one ☐ I already have one ☐ Please tell me more

09 Worth a thought

tick anything that applies — we'll talk it through and point you to the right specialist where needed

- ☐ I have a partner I'm not married to
- ☐ There's someone I want to leave out
- ☐ I own or part-own a business
- ☐ A beneficiary would struggle managing money
- ☐ I'm planning to marry soon
- ☐ I'm worried about care fees or Inheritance Tax
- ☐ I have stepchildren I haven't adopted
- ☐ I own property or assets abroad
- ☐ Someone I'd provide for has a disability
- ☐ I've been divorced, or I'm separated
- ☐ I've been asked to be a carer, or I have one

ANY EXISTING WILL — WHERE IS THE ORIGINAL KEPT?

Your new Will will revoke the old one, so please keep your current Will safe until the new one is signed — we'll take care of the old original after that.

QUESTIONS YOU'D LIKE TO ASK US — HOWEVER SMALL

That's everything

Bring this along to your appointment, or have it beside you if we're meeting by video. Gaps are completely normal — we'll go through it together and turn it into a Will that says exactly what you mean. If you haven't booked yet, a short call is the easiest place to start.

CALL
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EMAIL
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REQUEST A CALL BACK
adewills.co.uk/contact-ade-wills

General information to help you prepare — not legal or financial advice, and no client relationship is created. Reflects the law in England and Wales. Nothing here is binding or forms part of your Will; keep it safe, as it may contain personal financial details. A.D.E Estate Planning Limited, 46 Woodstock Road, Oxford, OX2 6HT · adewills.co.uk · Your Will is written by an accredited member of the Society of Will Writers, with full PI cover.