**Will Planner**

**Your legacy can give peace of mind to your family and a future for Havens Hospices**

This information will be used by your solicitor to draft a Will which is best suited to your personal circumstances:

Your Personal Details:

|  |  |
| --- | --- |
| First Name: | Partner’s first name: |
| Second Name: | Partner’s second name: |
| Surname: | Partner’s Surname: |

Your address: Your Partner’s address

|  |  |
| --- | --- |
|  |  |

Executors full names and addresses:

|  |  |
| --- | --- |
| First Executor: | Second Executor: |

If you wish to appointment further Executor(s) please write their details below:

Your Child/Children’s full names and addresses:

|  |  |
| --- | --- |
|  |  |

Guardian(s) full names and addresses:

|  |  |
| --- | --- |
|  |  |

**What is the value of your Estate?**

Use this section of the form to help you work out the value of your assets:

|  |  |
| --- | --- |
| Your Home (or share in it) | £ |
| Other property or land | £ |
| Cars and other vehicles | £ |
| Home contents including furniture and fittings | £ |
| Items of particular value (e.g. jewellery or art) | £ |
| Money in banks and building societies | £ |
| Shares/Investments/National Savings/Premium Bonds | £ |
| Insurance and Pensions | £ |
| Other savings and assets | £ |
| **Total Assets:** | **£** |

Use this section of the form to work out your liabilities:

|  |  |
| --- | --- |
| Mortgage | £ |
| Loans and Overdrafts | £ |
| Credit Cards | £ |
| Credit or HP Agreements | £ |
| Other liabilities | £ |
| **Total Liabilities** | **£** |

|  |  |
| --- | --- |
| **Assets less liabilities = Total Estate Value** | **£** |

If your partner has any assets or liabilities held in their own name, please include these on a separate sheet of paper.

**Bequests**

In the boxes below, make a note of any Specific, Pecuniary or Residuary gifts you want to leave in your Will

1. Specific bequests (items) Write down the full names and addresses of all individuals, charities (with registered charity numbers) or other organisations you want to benefit, together with a brief description of the item
2. Pecuniary bequests (set amount of money) Write down the full names and addresses of all individuals and charities (with registered charity number) you want to benefit and the amount you wish them to have
3. Residuary Bequests (a percentage or all of the residue of your estate) Write down the full names and addresses of all individuals and charities (with registered charity number) and the percentage of the residue you wish them to have

**Bequests:**

|  |  |
| --- | --- |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |
| Full Name:  Address: | Item:  Description:  Pecuniary gift: £…..  Residue: ……..% / or whole of residue |

If necessary, please continue your bequests on a separate sheet of paper

**Bequests continued**

What do you want to happen to your bequests if any of your beneficiaries die before you?

In the box below, write down the full name and address of any individual or charity (with Registered Charity Number) that you wish to benefit from one of the bequests above in the event that any of the original beneficiaries named in your Will dies before you.

|  |
| --- |
| **e.g. in the event that [ ] (name of original beneficiary) dies before me, I wish the gift of [ ]**  **to pass to [ ] (name & address of substitute beneficiary)** |

If you have any questions for your solicitor or Will Writer, please write these on a separate piece of paper that you can refer to during your appointment. Don’t feel silly asking questions, it is vital that you fully understand your Will and the Will-making process.

**LEGAL TERMS**

Glossary of legal terms you will need to know when making your Will:

**An Administrator**

is someone appointed by law to settle your affairs if you die with no Will. An administrator may also be appointed if there is a valid Will, but the named Executor is unable or unwilling to administer the estate

**A Beneficiary**

Is anyone who receives a legacy from a Will

**A Bequest (or Legacy)**

Is a gift left in a Will. It can be:

- Specific : a definite object or property

- Pecuniary: a gift of a particular sum of money

- Residuary: a gift of money or assets left when other legacies and expenses have been paid. It is normally expressed as a part or percentage of the residue of your estate

**A Codicil**

Is an addition or amendment to an existing Will

**Your Estate**

Is the total value of everything you own at your death, less any outstanding commitments.

**An Executor**

Is the person or persons you choose to make your Will happen. They can be a relative, a friend, or your solicitor

**Guardians**

Are the people chosen by parents to look after their children in the event of their death

**Intestacy**

Is the name for the situation which arises when some dies without making a Will

**Inheritance Tax**

Is a 40% tax deducted from estates with a value of more than £325,000. Money left to your spouse or to a charity is not taxed. If your spouse died before you and did not use up their full inheritance tax allowance, this will be added to your own at the rate prevailing at your death

**Probate**

Is the legal process to establish whether your Will is valid. If not, an administrator is appointed.

**A Testator/Testatrix**

Is the person making the Will

**A Trust**

Is an arrangement you can make in your Will to administer part of your assets after your death

**Any Questions?**

On a separate sheet please list any questions you may have for your solicitor and keep it with your Will planner in a safe place.

N.B. This Will Planner cannot be used as a valid Will. For a Will to be valid, it must be correctly drawn up, and it must be signed, dated and witnessed

**Bequests to Havens Hospices**

Are you considering leaving a gift to Havens Hospices in your Will?

When making or amending your Will it is easy to include a gift to Havens Hospices. A gift in your Will (a “legacy”) is a wonderful way to support a charity right in the heart of your local community.

**Do I need to be rich to leave a gift to Havens Hospices in my Will?**

You don’t need to be rich – an item from your personal possessions, a sum of cash, or a share of your residuary estate - whatever you feel you can afford - can achieve a huge amount for Havens Hospices. Every donation benefits our patients. We need to raise over £80,000 every week to ensure that we can continue caring for the adults, children and families who use our services, so any gift, large or small, in your Will is greatly appreciated.

Legacy gifts or “bequests” are enormously important to Havens Hospices. Without legacy gifts we simply could not afford to carry on giving the kind of physical, emotional and practical care to the adults, children and families who use our services. Your legacy can help to secure a future for care at Havens Hospices.

If you intend to leave a gift to Havens Hospices in your Will, you will need the following information:

Our address is: Appeal and Administration Office

Havens Hospices

Stuart House

47 Second Avenue

Westcliff-on-Sea

Essex SS0 8HX

Registered Charity No. 1022119

**If you have any questions, or need further information, please contact 01702 221670 or by email info@havenshospices.org.uk**