

This handy asset guide, will help you break down how much your estate is worth. You can take it to the solicitors when making or updating your Will.

Lancashire, Manchester & N Merseyside This is only a simple guide, and you may find that you need to add other items to the list.

1. Your details

2. Your partner / spouse's details:

Your full name:	
Address:	
Postcode:	
Date of Birth:	

Your full name:	
Address:	
Postcode:	
Date of Birth:	

3. Child(ren)'s full name, address(es) and date(s) of birth, including children from previous marriages.

Full Name	Address	Date of birth

4. What do you own (Assets) If you own your own home, how much is it worth? Other properties or land Vehicles Home contents (furniture, electrical etc) Valuable (lowellory etc)	£ £ £ £ £	Is th item Join own Y	tly	
Valuable (Jewellery etc) Insurance/pensions/savings or investments	£			
Bank accounts	£			
Miscellaneous assets	£			
Total Assets	£			
What do you owe (liabilities)		item Join	Is this item Jointly owned?	
Mortgage	£	Y	N	
Loans/Overdrafts	£			
Other Credit or extended purchase				
agreements	£			
Total Liabilities	£			
Estate Value (total assets less total liabilities)	£			

## 5. Who do you want to leave a gift to, and what would you like to give them?

Who	Bequest

**Pecuniary** is a sum of money you wish to gift, for example; £1000.

**Residual** bequest is the whole estate or a percentage of the estate, for example; 10%

Specific bequest is a specific item, for example; a vehicle, painting, jewellery.

Who would you like to be your executors?
You can appoint up to 4 executors – they can also benefit from your Will.

Who			

If you do wish to leave something to wildlife in your Will, you will need our details:

The Lancashire Wildlife Trust for Lancashire, Manchester and N Merseyside,

Registered Charity number: 229325

Address: The Barn, Berkley Drive, Bamber Bridge, Preston, PR5 6BY

Please <u>do not</u> send this to the Wildlife Trust, this is for your information only and should only be used when writing your Will. We advise that you seek professional support from a solicitor.

For your safety, we advise that you keep this information secure and store it somewhere appropriate.