

We offer a full range of Wills and on receipt of your instructions one of our solicitors will be happy to discuss your requirements to ensure that the correct style of Will is prepared for you.

To commence the will writing process we would ask that you complete and return this Will Planner.

About You

You will need to provide us with details about yourself including your full name, date of birth, current address, relationship status and the names and dates of birth of any children that you have.

Please enter the following details about you

Title: Mr/Mrs/Ms/Ms/Other	Full Postal Address:
Surname:	
Full Forenames:	Telephone No:
Date of Birth:	Email Address:

What is your marital status?

- Married In a civil partnership Living with partner
Single/Divorced Separated Widowed

About your Spouse/Partner

Please enter the following details about your spouse/partner

Title: Mr/Mrs/Ms/Ms/Other	Full Postal Address:
Surname:	
Full Forenames:	Telephone No:
Date of Birth:	Email Address:

About your children

Please enter the following details about your children

Name of Child	Date of Birth	Home Address

About your assets

We need to understand the extent of your estate and the type of possessions/assets that you have. This will allow us to ensure that your Will is complete and have identified your potential liability to Inheritance Tax.

Please list all of your assets (what you own) and liabilities (what you owe) below then add together everything you own and subtract everything you owe to work out what your estate is worth.

Please enter the following details about the value of your assets

Assets	Value	Liabilities	Value
Home	£	Mortgage	£
Other property or land	£	Loans/overdrafts	£
Car (or other vehicle)	£	Credit Cards	£
Home contents including furniture and fittings	£	Other debts	£
Items of particular value (e.g. jewellery, antiques)	£		
Savings in banks and building societies	£		
Investments, Shares, Premium bonds etc	£		
Insurance Policies	£		
Pensions	£		
Other savings and assets	£		
Total A	£	Total B	£
Total A – Total B = Total Estate Value		£	

Guardians for Children

If you have children who are under the age of 18, you will need to make provisions for them. This includes naming a legal guardian who will be legally responsible for your children should you and their other parent both die whilst they are under the age of eighteen. You will need to provide the full names and addresses of your Legal Guardians

Legal Guardian(s) Full Name(s)	
Legal Guardian(s) Postal Address(es)	

You might also want to put financial arrangements in place for your children. For example, you may want their inheritance to be placed in a Trust which they can only access at a certain age.

Executors

Next you will need to choose your Executors. Your Executors are the people who will wind up your affairs after you die. It is a job that carries a lot of responsibility, so it is important that you choose somebody that is capable of carrying out the role. Most people will name someone they know and trust to be their Executors. If you choose only one person to act as an Executor, you should always nominate a replacement in case that person is unable or unwilling to act.

If you are choosing individuals as your Executors, then you will need to provide their full names and addresses

Executor(s) Full Name(s)	
Executor(s) Postal Address(es)	

If you are struggling to think of someone who could act as your Executor, you may wish to appoint Paris Steele to act in that role.

Who do you want to leave your estate to?

The people you leave your estate to are known as the beneficiaries of your estate. You may wish to leave a sum of money (a pecuniary legacy) or an item of property (a specific legacy) to a particular person or charity. The remainder of your estate (not included as a specific or pecuniary legacy) forms the residue of your estate. Please use this section to think about the people and/or charities you care about most and want to leave your estate to. Please note that if you are gifting to charity you will need to include the Registered Charity Number.

Name and address	% share	Fixed sum	Specific item
	%	£	
	%	£	
	%	£	
	%	£	

If any of the people you mention above do not survive you, what would you like to happen to their legacies?

Other wishes

You have the opportunity to include other wishes that you have. These can include your funeral wishes but you can leave that to your loved ones to sort out if you prefer. You might also want to write a Letter of Wishes to accompany your Will explaining the motivation behind the decisions you have made. This can be very useful to your Executors who will then have a better understanding of why you decided to leave your estate as you have. If you have excluded someone from your Will it can also explain that decision. Please use this section to include any wishes that you have.

Funeral Wishes	
I wish to be buried/cremated	
I wish a religious/non-religious funeral service	
I have no specific funeral wishes	
Other wishes	

Other matters

Please answer the following questions

Do you consider anywhere other than Scotland to be your permanent home?	Yes/No
Do you own a share in a business?	Yes/No
Are you leaving anything of value to someone who has a learning disability and/or is reliant upon means tested benefit?	Yes/No
Do you own anything jointly with anyone other than your spouse or partner?	Yes/No
If you add up the value of everything you own does it come to more than £325,000 (if you are single, divorced or widowed); or £650,000 (if you are married/ in a civil partnership)?	Yes/No
Do you own anything outside Scotland?	Yes/No
Do you wish to leave your house or your share in it as a separate gift in your will to anyone other than your spouse or partner?	Yes/No
Do you wish to leave a timeshare/land/buildings/intellectual property as a separate gift in your Will?	Yes/No

Additional Information

If you have any additional information that you feel will be helpful to writing your Will, please use the box below.

Legal Terms

Glossary of words you might need to know when making your Will

Assets	Everything that you own, including your share in assets held jointly with someone else.
Beneficiary	a person or organisation who will receive a gift in your Will.
Codicil	a Legal document that makes an amendment or addition to your current Will.
Estate	your property, money and possessions.
Executor	someone you choose and name in your Will to deal with your affairs in accordance with your Will after you've died.
Grant of Confirmation	a document issued by the Sheriff Court confirming who is authorised to deal with your affairs after you have died.
Guardians	the people you choose and name in your Will to look after your children in the event of your death.
Inheritance	when someone receives money, property or another personal possession from the person who has died.
Inheritance Tax (IHT)	is a 40% tax imposed on the portion of an estate exceeding £325,000. Money left to your spouse or a charity is not taxed. If your spouse dies before you and didn't use their full IHT allowance, it will be added to yours, at the rate current when you die.
Intestacy	where someone dies without leaving a Will. There are then legal rules governing who can deal with your estate and who benefits from it.
Legacy or Bequest	a gift you leave in your Will to an individual or organisation.
Liabilities	any money that you owe or bills that must be paid from your estate.
Pecuniary Legacy	a cash gift – this is a gift of a set sum of money.
Residual Legacy	a share of an estate – this is a percentage of everything you own after any pecuniary legacies, specific legacies, debts and legal fees have been paid out.
Specific Legacy	a specific term, such as a house, car or jewellery.
Testator/Testatrix	the man/woman whose Will is being written.
Trusts	where someone holds money or property on behalf of somebody else.