

# The Venerable Mary Aikenhead Legacy Appeal Will Planner



St Margaret of Scotland Hospice  
Open to All in Need of Care



## Simple Will Planner

Prepare for your meeting with your solicitor by completing this checklist.

<b>Your name and address</b>	
<b>Your partner's name and address (if different from your own)</b>	
<b>Your executors</b> <b>This could be friends or family or a solicitor. Do make a note of their full names and addresses.</b>	
<b>Children's full name and addresses (if different from your own)</b>	
<b>Guardian's full name and address</b> <b>Please discuss your wishes with the people you want like to appoint.</b>	

## Work out the value of your estate

In this section below, make a list of everything you own and make a note of its approximate value.

This section will help you work out the value of your estate. In the second section, think about what you owe and make a note of your liabilities.

The result is the total.

<b>What is the value of your major assets</b>	<b>£</b>
<b>Your home (or share of it)</b>	
<b>Other property/land/cars/other vehicles</b>	
<b>Home contents/Jewellery</b>	
<b>Money in Bank(s) and Building Society</b>	
<b>Shares, investments, national savings</b>	
<b>Insurance and pensions/ other savings</b>	
<b>A – Total assets</b>	

<b>What are your major liabilities</b>	<b>£</b>
<b>Your mortgage</b>	
<b>Loans and overdrafts</b>	
<b>Your credit cards</b>	
<b>Credit or HP agreements</b>	
<b>Other liabilities</b>	
<b>B – Total liabilities</b>	
<b>A Total assets – B Total liabilities= Total estate value</b>	<b>£</b>



## **Make Notes of Any Questions**

**Now that you have started thinking about you will you may have questions or issues you want to discuss with your solicitor. List them here and you'll have them to hand when you meet.**

**To be discussed**

**Contact us:**

**If you would like more information about leaving a gift in your will please contact us on 0141-435-7018 or email [fundraising@smh.org.uk](mailto:fundraising@smh.org.uk)**

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