



Will planner

A straightforward guide to help you prepare for writing your Will.



Will planner

Writing your Will is one of the most important steps you can take to ensure your wishes are respected and loved ones are cared for. This planner is designed to help you prepare for writing your Will. Whether you're just starting or updating an existing Will, it will help you gather the important information you will need.

Please note that this checklist is not a legal document and does not act as a Will. Please consult a solicitor or professional Will writer when writing or amending your Will.

Important names and addresses.

Next of Kin/partner's name and address:

Executors' names and addresses:

Executors are the people who will carry out the wishes in your Will. You might include family, friends or your solicitor. You can have up to four executors.

You only need to fill in below if you have dependent children.

Children's names and addresses:

Guardian's names and addresses:

You can choose who you would like to care for your child or pet in the event of your death. Remember to discuss your wishes with the people you choose to appoint so they are happy to be named.

Work out how much your estate is worth.

List all 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.

Assets	Value	Liabilities	Value
Home	£	Mortgage	£
Other property or land	£	Loans/overdrafts	£
Car (or other vehicles)	£	Credit cards	£
Home contents including furniture and fittings	£	Credit agreements	£
Items of particular value (e.g. jewellery, antiques)	£	Other debts	£
Savings in banks and building societies	£		£
Investments, Shares, Premium bonds etc.	£		£
Insurance policies	£		£
Pensions	£		£
Other savings and assets	£		£
Any businesses you own or are a shareholder in	£		£
Total Assets	£	Total Liabilities	£
Total Assets – Total Liabilities = Total estate value		£	

Decide what you would like to leave to whom.

You will need to decide which gifts will go to whom in your will. You can give a specific item (e.g. a family heirloom), a fixed cash amount, or a percentage of your estate (calculated when all other costs and gifts have been taken into account).

I'd like to include Describe what you'd like to include.	to this person. Give their full name and address.

Gifts to charity I'd like to include Describe what you'd like to include.	to this charity. Give name of the charity, address and registered charity number.

Please consider leaving a gift to Age Scotland in your Will.

Gifts left to us in Wills are essential in enabling us to plan for the future and allow us to support people so no one faces the challenges of older age alone. If you would like to remember Age Scotland in your will, please pass the details below to your solicitor:

Age Scotland, Causewayside House, 160 Causewayside, Edinburgh EH9 1PR.
Charity Number: SC010100.

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

Write instructions for your funeral to help your loved ones to respect your wishes.

In your will, you may wish to include any particular wishes for your funeral or memorial service, such as whether you want to be buried or cremated, and where you'd like the service to be held.

Additional notes and questions.

Will terminology

There are three types of gifts you can include in your Will:

- Specific – an item such as a piece of jewellery.
- Pecuniary – a set amount of money.
- Residuary – a percentage of your estate.

Next steps:

Contact a solicitor or professional Will writer to write your Will.

Age Scotland offers a free Will writing service to help make the process of writing or updating your Will straightforward.

➡ Visit www.age.scot/freewill

Get in touch

If you would like to let us know your intention to leave a gift to us in your Will, please visit age.scot/pledge, email legacies@agescotland.org.uk or call us on 0333 323 2400 so that we can thank you personally for your kind support.



Get in touch



Richenda Thomson
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 **0131 668 8035**

@ Legacies@agescotland.org.uk

Age Scotland provides a range of services and your gift will go wherever the need is greatest. Age Scotland, part of the Age Network, is an independent charity dedicated to improving the later lives of everyone on the ageing journey, within a charitable company limited by guarantee and registered in Scotland. Registration Number: SC153343 Charity Number: SC010100. Registered Office: Causewayside House, 160 Causewayside, Edinburgh EH9 1PR.