

# Some helpful information

You may wish to complete this form and take it with you when you discuss making or changing your Will with your solicitor.

## SECTION 1: VALUING YOUR ASSETS

### What you Own (your assets)

You should include your share of any property, money or possessions owned jointly with any person, including with your husband or wife

Home	£
Other Property	£
Household Contents (insurance value)	£
Valuables (insurance value)	£
Furniture/Antiques (insurance value)	£
Jewellery (insurance value)	£
Car(s) (resale value)	£
Any other Assets	£
Savings and Cash (incl. bank and building society accounts)	£
Stocks and Shares (market value)	£
Other Investments	£
Pension Benefits	£
Life Assurance (if you died now)	£
Any other Investments	£
<b>Total Assets</b>	<b>£</b>

### What you Owe (your liabilities)

You should not include anything that will be paid off at your death

Mortgage	£
Bank Loans	£
Hire Purchase Agreements	£
Bank Overdraft	£
Credit Cards	£
Tax Owed	£
Any other Bills	£
<b>Total Liabilities</b>	<b>£</b>
<b>Value of your Estate</b> (total assets minus total liabilities)	<b>£</b>

## Your Legacy counts



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## SECTION 2: MAKING A BEQUEST

The following is suggested text for inclusion in your Will depending on the type of Legacy that you choose:

**Residual Bequest** – I give, devise and bequeath to The Wildlife Trusts (charity number 207238) of The Kiln, Waterside, Mather Road, Newark, Nottinghamshire NG24 1WT, the whole (or a \_\_\_\_\_ per cent share) of my residuary estate for its general charitable purposes and I declare that the receipt of the Treasurer or other proper officer shall be a full and sufficient discharge for the said Legacy.

**Specific Bequest** – I give, devise and bequeath to The Wildlife Trusts (charity number 207238), of The Kiln, Waterside, Mather Road, Newark, Nottinghamshire NG24 1WT, my (description of item or property) \_\_\_\_\_

\_\_\_\_\_ for its general charitable purposes and I declare that the receipt of the Treasurer or other proper officer shall be a full and sufficient discharge for the said Legacy.

**Pecuniary Bequest** – I give, devise and bequeath to The Wildlife Trusts (charity number 207238), of The Kiln, Waterside, Mather Road, Newark, Nottinghamshire NG24 1WT, the sum of £ \_\_\_\_\_ ( \_\_\_\_\_ pounds) for its general charitable purposes and I declare that the receipt of the Treasurer or other proper officer shall be a full and sufficient discharge for the said Legacy.

## SECTION 3: LEAVING A BEQUEST

Who you would like to remember in your Will and what you would like to leave them:

Who (individual/charity)	Bequest
1	
2	
3	
4	
5	
6	

## SECTION 4: YOUR EXECUTORS

Who you would like to choose as your Executors:  
You can appoint up to four executors – they may benefit from your Will.

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_

