

Your Estate checklist

Please complete this checklist and take it with you to your solicitor when making your Will. It is a good idea to keep the checklist with a copy of your Will, and let your next-of-kin and Executors know where to find them.

Property

(list your major assets and their approximate current value)

Your home £

Your second or holiday home/caravan £

Your home contents (furniture, etc) £

Antiques £

Jewellery £

Your car £

Other £

Financial

Bank/building society £

Stocks, shares, investments, etc £

National Savings £

Pension/benefits £

Life Assurance £

Business assets £

Other financial interests £

Money you owe

Mortgage outstanding £

Other loans £

Overdrafts £

Credit agreements £

Credit card debts £

Other money owed £

Money you are owed

Name and address of debtor

Date of loan £

Amount outstanding £
