

Asset Checklist

Please feel free to use this checklist as a guide to help you work out the assets you need to mention in your Will. Don't forget to take it with you when you meet your solicitor so nothing is forgotten. Make sure to ask your executors if they are happy to take on the responsibility of being your executor before you officially name them.

Make sure that someone knows where your Will is kept once it is created.

Assets

Your home(s)

Full value:

£ _____

Shared ownership value?:

£ _____

Any second home, holiday home:

£ _____

Jewellery/Antiques/Collectables:

£ _____

Home contents (furniture etc):

£ _____

Money:

Bank account value:

£ _____

Name of bank:

Savings account(s) value:

£ _____

Name of bank:

Stocks and shares value:

£ _____

Name of provider(s):

Liabilities

Your home(s)

Outstanding mortgage:

£ _____

Name of provider:

Money:

Loans:

£ _____

Name of provider:

Overdraft

£ _____

Name of provider:

Credit card debts

£ _____

Name of provider:

Assets (continued)

Money (continued):

Pension:

£

Name of provider:

Life Insurance

£

Name of provider:

Your car (value):

£

Other:

£

Liabilities (continued)

Money (continued):

Any other debts

£

Executors

Executor One (name and address):

Name:

Address:

Executor Two:

Name:

Address:

Who do you intend to leave money to?

Include percentages and type of legacy you wish to leave

Name and address of friends/family you wish to leave money to:

Name of charity(ies) you wish to leave money to – include charity numbers and addresses:
