

# Asset Checklist

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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:

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Life Insurance

£

Name of provider:

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### Your car (value):

£

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### Other:

£

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## Liabilities (continued)

### Money (continued):

Any other debts

£

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## Executors

### Executor One (name and address):

Name:

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Address:

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### Executor Two:

Name:

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Address:

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## 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:

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

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