# Will planning checklist

You can download and edit this checklist to help you prepare to write your will. It will help you record the information that your solicitor will need.

Once you're ready, you can use our free will writing service, which puts you in touch with trusted local solicitors who can help you write your will for free: [shelter.org.uk/willwriting](https://www.shelter.org.uk/willwriting)

Considerations before writing your will

If you’re planning to leave your home in your will, we recommend that you consider the following questions. See our key considerations for guidance on these points at [shelter.org.uk/considerations](https://www.shelter.org.uk/considerations), or you may want to speak to your solicitor.

| **Questions to consider** | **Notes** |
| --- | --- |
| What would you like to happen to the contents of your home? |  |
| How do you want to settle any debts secured against your home, such as a mortgage? |  |
| Could anyone be affected by this gift in your will?  For example, if you have tenants or anyone living in your home, or if your home is jointly owned. |  |

Steps to prepare to write your will

If you’re writing a will for the first time: we recommend that you complete the information below ahead of your appointment with a solicitor.

If you have an existing will: leaving your home as a gift in your will is a major change, so it’s best to write a new will. We recommend checking the information below in your current will to help you identify any other changes needed.

1. Appoint your executors

Executors are the people responsible for carrying out the instructions in your will. You might include family, friends or a solicitor. You can have up to four executors.

| **Name of your executor(s)** | **Address of your executor(s)** |
| --- | --- |
|  |  |
|  |  |
|  |  |
|  |  |

2. List your assets

Make a list of your possessions and financial assets, and their approximate current value. This might include:

| **Item** | **Value** |
| --- | --- |
| Property | £ |
| Furniture | £ |
| Other home contents | £ |
| Car | £ |
| Money in current or savings accounts | £ |
| Stocks, shares, bonds | £ |
| Insurance policies | £ |
| Pension plan | £ |
| Any debts owed to you | £ |
| **Total value of your assets** | **£** |

3. List any debts you have

Add up the total of any debts you have. This might include:

| **Debt** | **Amount** |
| --- | --- |
| Mortgage | £ |
| Loans | £ |
| Overdraft | £ |
| Credit card debts | £ |
| Hire purchases | £ |
| **Total debts** | **£** |

4. Prepare questions for your solicitor

Consider any questions you might want to discuss with your solicitor if you’re planning to leave your home to Shelter.

| **Questions for your solicitor** |
| --- |
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|  |
|  |

Suggested will wording

If you would like to leave your home in your will to Shelter, you can provide your solicitor with this suggested wording:

'I give to Shelter, the National Campaign for Homeless People Ltd (“Shelter”) of 88 Old Street, London, EC1V 9HU, registered charity number 263710 (England and Wales) the net sale proceeds of my property: [insert address and postcode] (“my property”) free of tax for its general charitable purposes and I declare that the receipt of the Finance Director or other proper officer at Shelter for the time being shall be a sufficient discharge to my executor(s). In the event that my property should have been sold in my lifetime (or a sale agreed but not completed prior to the date of my death), then I give a sum representing the net sale proceeds of my property to Shelter in lieu of the above gift.'

Write your will for free

When you’re ready, you can use our free will writing service, which puts you in touch with trusted local solicitors who can help you write your will for free: [shelter.org.uk/willwriting](https://www.shelter.org.uk/willwriting)

Contact us

If you have any questions, we’re here to help. Please contact our Gifts in Wills team on [0344 515 1617](tel:03445151617) or at [legacies@shelter.org.uk](mailto:legacies@shelter.org.uk)

After you’ve written your will

Keep your will safe

Make sure your will is stored in a safe place and that your executors know where to find it.

We recommend leaving a copy with your solicitor, or with someone you trust. You can also register your will with the National Will Register for a small fee, at [nationalwillregister.co.uk](https://www.nationalwillregister.co.uk/)

Let us know

If you’ve left your home to Shelter in your will – or you’re considering it – we’d love it if you told us. Knowing helps us to plan for the future and gives us a chance to thank you for your incredible generosity.

You can let us know on our website form: [shelter.org.uk/giftsinwills](https://www.shelter.org.uk/giftsinwills) or get in touch at [legacies@shelter.org.uk](mailto:legacies@shelter.org.uk) or [0344 515 1617](tel:03445151617).