Asset checklist

THREE IMPORTANT STEPS TOWARDS MAKING OR CHANGING YOUR WILL

1. Calculate the value of your assets

It is important when you make or change your will to have a clear idea of what your estate is worth. A good way to do this is to list everything you own and its approximate value, based on what you would be likely to receive for each item or asset if you were to sell it now. If you own an item or property jointly with someone else, you should include only the value of your share.

This checklist will help you make a list of what you own and get a good idea of what your estate is worth.

ADD UP WHAT YOU OWN (CURRENT VALUE)	
Possessions	
Home	£
Furniture	£
Other home contents	£
Car	£
Jewellery, paintings, antiques	£

Financial assets	
Usual amount in current accounts	£
Amount in savings accounts	£
Personal life assurance (sum assured)	£
Stocks, shares, bonds	£
Any debts owed to you	£
Other insurance policies	£
Pension plan	£
TOTAL ASSETS	**£**

DEDUCT WHAT YOU OWE	
Mortgage outstanding	£
Loans outstanding	£
Overdrafts outstanding	£
Credit card debts	£
Hire purchase still to repay	£
Other debts	£
TOTAL DEBTS AND LIABILITIES	**£**

TOTAL NET VALUE OF YOUR ESTATE	
(total of assets, less total of debts and liabilities)	**£**

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2. Decide who you want to benefit and what you want them to receive

People or organisations you want to benefit	Share of estate	Specific sum	Specific item

3. Decide who you want to be your executor(s) and, if you have any children under 18 years of age, who you would like to be their guardian(s)

Executor 1

Name

Address

Postcode   Contact tel

Executor 2

Name

Address

Postcode   Contact tel

Guardian(s)

Name

Address

Postcode   Contact tel

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