

This form will help you to collect the most important facts and figures you'll need when you come to write your Will. Depending on your circumstances, not all of the sections will be relevant. But the more fully you can fill out this form, the more easily and quickly you'll be able to instruct your Will-writer.

Please note: this form does not constitute a Will. It is just a tool for organising your thoughts. Do not return this form to CAFOD.

Your personal details

Full name and address Include any other names you might be known by.	Date of birth
Name and addresses of your children If they are under 18, include their date of birth and choose who you would like to appoint as their guardian. Check they are willing to accept the responsibility.	
Full name and address of your executor(s) We recommend that you appoint two individuals who you trust to administer your estate. If you only want to appoint one executor it is a good idea to include a substitute executor in the event that the first is unable to act. Your executors can be family, friends or a professional. They can also be beneficiaries under the Will (unlike witnesses). Check your executors are willing to accept the responsibility.	
Name and addresses of your two witnesses. State their relationship to you, or professions. Witnesses <u>must not</u> be beneficiaries in your Will. You and both witnesses must sign your Will together without leaving the room, or via video following specific guidelines.	

Your estate

Note down your major assets and their estimated value, along with any significant debts. This will give you an idea of the value of your estate. It will also help you assess any Inheritance Tax implications so you can seek advice accordingly. (See our guide for more information about Inheritance Tax).

Your house and other property	£
Bank or building society accounts	£
Investments	£
Pension and life assurance plans	£
Car	£
Furniture/household possessions	£
Items of sentimental worth	£
Other	£
Total 1	£

Outstanding mortgage payment	£
Credit cards	£
Loans	£
Overdraft or other significant debts	£
Total 2	£

Your estate (total 1 minus total 2)

£

Remembering a charity

If you decide to include a charity in your Will, please be assured that your gift will be greatly appreciated. When naming a charity, it's important to include its full registered details to ensure your gift reaches them even if they move offices or change their name over the years. You or your adviser will be able to find this information on the Charity Commission website, which has details of all UK registered charities (charity-commission.gov.uk).

CAFOD's details are:

Registered name: The Catholic Agency for Overseas Development (CAFOD)

Registered address: Romero House, 55 Westminster Bridge Road, London, SE1 7JB

Registered charity number: 1160384

To save time, you can note the details of your chosen charities below. Although we've only allowed space for three, you can name as many organisations as you like.

Registered name:

Registered address:

Registered charity number:

Registered name:

Registered address:

Registered charity number:

Registered name:

Registered address:

Registered charity number:

Suggested wording for your Will

If you have decided to remember CAFOD in your Will, we'd like to take this opportunity to say a huge thank you. Your gift will truly make a difference to vulnerable communities.

Here is an example of how the gift can be worded in your Will:

A share of your estate:

I give [all/fraction/% share] of the residue of my estate to the Catholic Agency for Overseas Development (CAFOD) (RCN 1160384) of Romero House, 55 Westminster Bridge Road, London, SE1 7JB to be used for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be a sufficient discharge to my executors.

A cash amount or specific gift:

I give to the Catholic Agency for Overseas Development (CAFOD) (RCN 1160384) of Romero House, 55 Westminster Bridge Road, London, SE1 7JB the sum of [£amount/the specific gift of my item] to be used for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be a sufficient discharge to my executors.

Notes

Make a note of any other information or instructions you want to make known. Here are some things you might want to consider:

- If you have pets, who would you like to look after them and how should this be paid for?
- Do you have any preferences regarding your funeral arrangements?
- What would you want to happen to your gift if the intended recipient passes away during your lifetime?
- Have you made any substantial gifts in the last seven years? These may have Inheritance Tax implications.
- Are there any questions you want to ask your Will-writer?

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