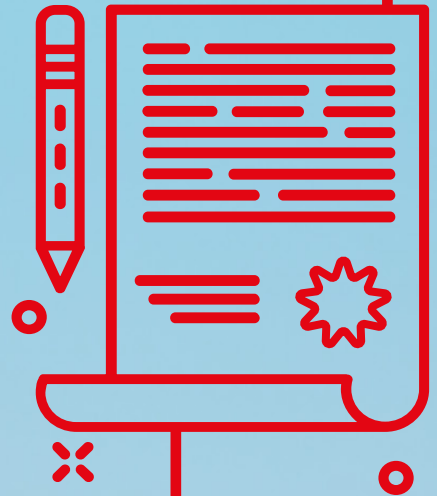




# WILL PLANNER

A simple way to begin writing your Will.



HOW

**ACTION FOR  
CHILDREN**

**WORKS**

# Planning ahead. Protecting your loved ones.

While it may seem a daunting task, making your Will is one of the most important things you can do to protect your loved ones; ensuring that your money, property, and possessions – commonly known as your ‘estate’ – go to those you want them to.

This could be anything from items with purely sentimental value, to that which provides financial security to your closest family and friends.

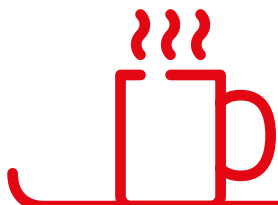
The aim of this planner is to make the process as simple as possible, coupled with our free, no-obligation Will-writing service offered by our carefully selected partners: Farewill and The Goodwill Partnership.

#### **Included within the planner, you will find:**

- A table of assets – to list everything you own
- A table of liabilities – to list anything you owe
- A table for gifts – for family, friends, and charities
- A glossary – to break down all the legal jargon into simple, everyday language.

**When planning your Will, take your time, sit down with a cuppa, and think things through.**

**If you have any questions, or need a little extra advice, please don't hesitate to get in touch. You can call us on 0300 123 2112 or email [legacies@actionforchildren.org.uk](mailto:legacies@actionforchildren.org.uk).**



## Personal Details

First Name:

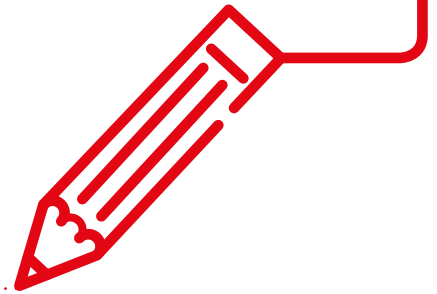
Middle Name(s):

Surname:

Address:

Postcode:

Date of Birth:



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## Partner/Spouse

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

Date of Birth:

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

Date of Birth:

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## Guardians for dependent children

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

## Executors

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

First Name:

Middle Name(s):

Surname:

Address:

Postcode:

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## Assets

	Yes	No	Value
Own a home?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Other property and land?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Vehicles?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Home contents? (Including furniture, fittings, electrical goods)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Valuables? (E.g. Jewellery, art, collectables)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Money held in banks, building societies and savings accounts?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Investments? (E.g. Stocks and shares)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Other? (E.g. Trust assets and pension)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>

## Liabilities

Mortgage?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Loans/overdrafts?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Credit?	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>

### Total Assets

### Total Liabilities

### Total Estate

£  - £  = £

## Gifts

1.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

2.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

3.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

4.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

**Do what's right. Do what's needed. Do what works.**

## 5.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

## 6.

**Pecuniary Gift (£)** Specific amount

**Residuary Gift (%)** Share of your estate

**Specific Gift** Specific item

Name:

Address:

If a charity, registered charity number:

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## Notes

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### Key things to remember

You should keep your Will somewhere safe (e.g. with your solicitor) and ensure your executors know where it is kept.

If you do not have a Will, the law will decide who inherits your estate, so – in writing one – you can be at peace, knowing that your loved ones will be looked after, and that any other related wishes you have will be fulfilled.

Keep your Will updated, as it may change under the following circumstances:

- Changes in relationship status
- Buying a new home/moving home
- Changes in your family
- Birth/adoption of a child
- Receipt of inheritance.

## Glossary

<b>Assets</b>	Everything that you own, including your share in joint assets.
<b>Beneficiary</b>	Person or organisation who will receive a gift in your Will.
<b>Codicil</b>	Legal document that makes an amendment or an addition to your Will.
<b>Estate</b>	Your property, money and possessions.
<b>Executor</b>	Someone you chose, and name, who is responsible for carrying out the wishes in your Will. They could be friends, family, or your solicitor. You can have up to four executors.
<b>Inheritance Tax</b>	Tax paid on someone's estate. If your estate exceeds £325,000, you will pay 40% on the excess. Gifts to your spouse, or a charity, do not get taxed (if you leave 10% of your estate to a charity, inheritance tax is reduced to 36%). <a href="http://www.gov.uk/inheritance-tax">www.gov.uk/inheritance-tax</a>
<b>Legacy/Bequest</b>	A gift left in your Will to an individual or an organisation.
<b>Pecuniary Gift</b>	Specified amount of money e.g. £1000.
<b>Probate</b>	The process of dealing with a Will.
<b>Residuary Gift</b>	Percentage of your 'residue': what's left of your estate, after other gifts, debts and fees are taken into account, e.g. 5% of your residue.
<b>Specific Gift</b>	Specific item e.g. jewellery, antiques, collectables...
<b>Testator/Testatrix</b>	Man/woman whose Will is being written.
<b>Witnesses</b>	Two people who must be present when a person is signing and dating their Will.



# What We Do

**For 150 years, we've been listening to, supporting, and acting to protect children – from our early days as National Children's Home, up until today – and into the future – as Action for Children.**

We exist to help the children and young people who need us most, across the UK – the 1.5 million neglected children, the children referred to local authorities 'every 40 seconds', the children and young people who need safe, loving homes.

We do this by:

- Stepping in early to stop abuse and neglect
- Supporting parents and keeping families together
- Finding loving foster and adoptive homes for children
- Supporting young carers
- Steering young people away from trouble – into training and jobs.

We reach over 370,000 children and young people every year.

And we do what we've always done – we listen, we act, then we do what's best for each child.

**That's how Action for Children works.**

## So, If You Do Decide To Leave Us A Gift In Your Will...

Whether it's:

- A specific amount
- A percentage of your estate
- A specific gift

You'll be creating an incredible legacy that enables us to continue ours; to be there for vulnerable children when they need us most.

Through this special way of giving, you'll be providing protection for the disadvantaged children we have yet to meet.

No matter the size of the gift, your generosity – your legacy – will allow us to be by their side for years to come.

To find out more about leaving a gift in your Will to Action for Children, please contact the Legacies team on 0300 123 2112, or email [legacies@actionforchildren.org.uk](mailto:legacies@actionforchildren.org.uk)

[actionforchildren.org.uk](http://actionforchildren.org.uk)

**HOW**

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# Free Will-Writing Offers

We are pleased to offer you the opportunity to have your Will written free of charge.

This can take place in the comfort of your own home, in the evening or on the weekend – whenever suits you best.

Or, if you prefer, you can have your Will written online.

We only offer this service through carefully selected partners:

## The Goodwill Partnership

The largest supplier of home-visit Wills in England and Wales. Wills are drafted by a registered solicitor. Free home visits are also available in the evening and on weekends.

You can contact the Goodwill Partnership by:

Telephone: **01482 636411**

Texting **GOODWILL14** to **60777**

Visiting **thegoodwillpartnership.co.uk/actionforchildren**



## Farewill

You can write your will online, in a few simple steps with live support from their Will specialists.

To make use of this offer:

Contact Farewill via our website **actionforchildren.org.uk/freewilloffers**

Or visit the Farewill website directly **www.farewill.com**

And claim your free Will using the code **actionforchildren1**.

HOW

**ACTION FOR CHILDREN**

IS WORKING WITH

the  
**Goodwill**  
Partnership

**Farewill**

You don't have to leave a gift in your Will to Action for Children to use our offers. However, if you choose to do so, it will be immensely appreciated.