

Will planning checklist



**Marie
Curie**

Are you planning to have your Will written or updated soon?

We recommend you complete this checklist and have it ready for your appointment – whether that's with a local solicitor, online or over the phone. It will capture a lot of the information your solicitor will need to know.

Important names and addresses

Your name and address:

Next of Kin name and address:

Executors' names and addresses:

Executors are the people who will carry out the wishes in your Will. You might include family, friends or your solicitor. You can have up to four executors.

You only need to fill in below if you have dependent children

Children's names and addresses:

Guardians' names and addresses:

You can choose who you would like to care for your child or pet in the event of your death. Remember to discuss your wishes with the people you choose to appoint so they are happy to be named.

Value of your estate

You can use the tables on this page to work out the value of your estate.

Your major assets

Your home (or share in it)	£
Other property or land	£
Home contents, including furniture and fittings	£
Valuable items (such as antiques, art and jewellery)	£
Cars and vehicles	£
Money in banks and building societies	£
Stocks, shares, investments	£
Insurance and pensions	£
Other savings and assets	£
Any businesses you own or are shareholder in	£
Total of your assets A	£

Money you owe (liabilities)

Outstanding mortgage	£
Other loans	£
Overdrafts	£
Credit agreements	£
Credit card debts	£
Other money owed	£
Total money you owe B	£

Total of your assets (A) – total money you owe (B) = Value of your estate	£
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Your legacy – what you'd like to include

You'll need to decide who your beneficiaries will be. This may include your loved ones and charities or causes close to your heart.

I'd like to include...	to this person or charity
Describe what you'd like to include. It may be a possession, amount of money or percentage of your estate.	Give their full name and address (remember to include the registered charity number if including a gift to charity).

Please consider including a gift to Marie Curie in your Will.

Our information is:

Marie Curie, One Embassy Gardens, 8 Viaduct Gardens, London SW11 7BW.

Registered charity numbers England and Wales – 207994, Scotland – SC038731

Whatever the illness, wherever you are, Marie Curie will be there for anyone with an illness they are likely to die from, and those close to them, right to the end. Currently 1 in 4 people do not get the end of life care they need. Your gift can help change that. With a gift in your Will for Marie Curie, you can help us give a better end of life care to all.

Some helpful terms

There are three types of gifts you can include in your Will:

- **Specific** – an item such as a piece of jewellery.
- **Pecuniary** – a set amount of money.
- **Residuary** – a percentage of your estate.
- **Beneficiaries** – People and organisations who you include a gift to in your Will.
- **Bequest/Legacy** – A gift left in your Will to a person or charity.

Get in touch

If you have any questions or concerns about including a gift to Marie Curie in your Will, contact your regional Legacy Lead.

You'll find your Legacy Advisor's details at mariecurie.org.uk/advisor or by calling **0800 716 146**

Free Will-writing service

We have online and solicitor free Will-writing services available for anyone over the age of 18. There is no obligation to include a gift to Marie Curie when using these services, however we would be so grateful if you did.

Visit mariecurie.org.uk/freewill for more information.

Marie Curie is the UK's leading end of life charity

Marie Curie is here for anyone with an illness they're likely to die from, and those close to them. Whatever the illness, wherever you are, we're with you to the end. We bring 75 years of experience and leading research to the care we give you at home, in our hospices and over the phone. And we push for a better end of life for all by campaigning and sharing research to change the system.

Marie Curie is a charity working across the UK and we need your support to do our vital work.

mariecurie.org.uk



If you have any questions about living with a terminal illness or bereavement, call our free Support Line on **0800 090 2309*** or visit mariecurie.org.uk/support