

Martha Trust – asset checklist

Three important steps towards making or changing your will

1 What do you have to leave?

It is important when you make or change your will to have a clear idea of what your estate is worth. The checklist will help give you an idea of the value of your estate, and will save time with your solicitor.

Everything I own – your assets (current value)

House	£	_____
Furniture/antiques/collectables	£	_____
Car	£	_____
Jewellery	£	_____
Bank accounts (current balance)	£	_____
Building society (current balance)	£	_____
ISAs/Premium Bonds	£	_____
Stocks and shares	£	_____
Life assurance policies	£	_____
Money owed to me	£	_____
By whom _____		
Other possessions	£	_____
Total assets	£	_____

Everything I owe – your liabilities

Mortgage – outstanding balance	£	_____
Bank loans	£	_____
Overdrafts	£	_____
Credit card debts	£	_____
Other debts	£	_____
Total liabilities	£	_____

Total Assets	£	_____
Less Total Liabilities	£	_____
TOTAL ESTATE VALUE	£	_____

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2 Who to include in your will?

Decide who you want to remember in your will – people, causes and organisations. And consider the types of gifts you might want to leave them.

Family

Name	Share of Estate	Specific Sum	Specific item
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Friends

Name	Share of Estate	Specific Sum	Specific item
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Charities/organisations

Name	Share of Estate	Specific Sum	Specific item
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

3 Who to make your executor(s), and legal guardian(s) if you have children under 18

Executor(s)

Name	Address	Postcode	Contact telephone
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Legal guardian(s) if you have children under 18

Name	Address	Postcode	Contact telephone
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____