

Calculating the potential value of your estate

This is not a legal form, but will help you organise your thoughts as you plan and write your will.

Your name	
Date you compiled this list	

Financial assets	
Bank or building society account/s	
ISAs or other savings	
Insurance policies	
Company shares	
Pensions	
Other savings	
Other financial assets	
Money you are owed	
Names and addresses of your debtors	

Value of your property	
House or flat	
Home contents	
Car	
Other items of value	
Total assets	

Your debts	
Outstanding mortgage	
Other loans	
Overdraft	
Credit card debt	
Items bought on credit	
Other money owed	
Total debts	

Executors' details	
Name	
Address	

Name	
Address	

Guardians for your children	
Name	
Address	

Name	
Address	