

## WILL PLANNER

We've included this planning sheet to help you prepare should you decide to talk to your legal adviser about making or updating a Will. Please note this document does not constitute a valid Will.

### 1. Personal Details

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

### 2. Partner's Details

Name(s):	
Last Name:	
Address:	
	Post code:

### 3. Children / Dependants Details

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

#### 4. Executer(s) Details

Name(s):	
Last Name:	
Address:	
	Post code:

Name(s):	
Last Name:	
Address:	
	Post code:

#### 5. Legal Guardian's Details

Name(s):	
Last Name:	
Address:	
	Post code:

## 6. The value of your estate

Here you can write down the estimated value of your assets and debts. The value of your estate – which you can leave to family, friends or an organisation is simply your total assets minus your total debts.

### Assets

Property	
Vehicles	
Household content (furniture etc)	
Art and Antiques	
Personal Items of particular value (jewellery etc)	
Savings in banks and building Societies	
Shares, Investments and Premium Bonds etc	
Insurance Policies	
Pensions	
Foreign/Oversees Assets	
Other	

If you have already nominated a beneficiary for your pension or insurance policy, these will sit outside what is considered a person's estate.

### Debts

Mortgage	
Loans and Credit Cards	
Other	

### Value of Estate

Total Assets	
Total Debts	
Value of Estate	

## 3. The People and causes you want to benefit

Use this section to think about the people and/or charities you care about most and want to leave gifts in your Will. Think about whether you want to leave specific items or amounts of money, or a percentage of your estate. Please note that if you are including a gift to charity you need to include the registered charity number.

**JAM's details,**

Joint Aid Management UK (JAM UK)  
Address: 46 Commercial Road, London  
E1 1LP, UK  
1050992 | SC043643

% Share:
Amount: £
Specific Item(s):

Name:	% Share:
Address:	Amount: £
	Specific Item(s):

Name:	% Share:
Address:	Amount: £
	Specific Item(s):

Name:	% Share:
Address:	Amount: £
	Specific Item(s):

Name:	% Share:
Address:	Amount: £
	Specific Item(s):

Name:	% Share:
Address:	Amount: £
	Specific Item(s):

#### **4. Special Instructions**

Use this section to include special instructions you may have – such as what you would like to happen if one or more of your beneficiaries die before you.


Once you have completed this Will planner, you can take it to a legal adviser.