



Will Planner



Veterans at Ease
BECAUSE MILITARY MINDS MATTER

Registered Charity No: 1140832

My Life. My Legacy.

Your Will is one of the most important legal documents you can make. But it does not have to be complicated or frightening.

Along with some plain-speaking legal advice from your solicitor, this little guide will help to get your Will sorted in no time.

ALREADY HAVE A WILL?

Great. If you already have a Will and want to leave a legacy gift to Veterans at Ease, all you have to do is make a 'Codicil' or amendment.

Speak to your solicitor about making a simple amendment to your existing Will, and they will guide you through it.

Mine to Give



You will be surprised how much you have to leave when you start to note it all down. There will be some treasured possessions that will mean a lot to loved ones. And of course the more practical financial support that could give your family and friends a little security.

So make a list of everything you own – giving an approximate value for each item.

ITEM	VALUE (£)
House and any other property	
Bank Account(s)	
Building Society Account(s)	
Investments Stocks and shares	
Life insurance Premium bonds	
Any money you are owed	
Business assets	
Cars, etc.	
Furniture/household possessions	
Other assets	
Total A	

What you owe. This could include:

ITEM	VALUE (£)
Outstanding mortgage	
Other loans	
Overdraft	
Credit card balance	
Other money owed	
Total B	

Simply take Total B from Total A. The result is the net value of what you can leave.

	VALUE (£)
Total A	
Total B	
Net total value of your estate	

Notes:

Family & Friends First



Now you know what you have to leave, you can use this list to write down names and details. You can give a specific item or amount of money to each person, or a percentage of everything you own. You can complete your form before or after you chat to your solicitor.

Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name	Address	% Share
		Amount
		Specific Item(s)
Name Veterans at Ease Registered Charity in England and Wales (Number 1140832)	Address Alington House 4 North Bailey Durham	% Share
		Amount
		Specific Item(s)

How To Hints



YOUR EXECUTORS — THE PEOPLE WHO WILL MAKE IT HAPPEN

You can have up to four executors to deal with your wishes. These could be friends, family, or a professional such as your solicitor. Whoever you choose, ensure you ask their permission. Make a note of your executor(s) below.

APPOINTING GUARDIANS

If you have children, this is probably one of your major motivations for writing a Will in the first place. Discuss your wishes with the people you wish to appoint to ensure they agree. Again, note down their names in the space below.

CHOOSE A SOLICITOR

The best way to find a reliable solicitor is word of mouth. A recommendation from a friend is always useful. Or take a look online. There are lots of websites that will list solicitors in your area.

The Law Society is a good place to start. Click the 'Find a Solicitor' button, then enter your postcode into the form, and then Wills and Probate from the drop down list of 'specialisms'.

Leaving a Gift to Veterans at Ease

If you do decide to leave a gift to Veterans at Ease in your Will, there are three main options.

- ◆ A share in your estate
- ◆ A specific sum
- ◆ A specific item

Once you have decided what kind of gift you would like to leave Veterans at Ease, it would be really helpful if you could ask your solicitor to use one of the following texts, thank you.

FOR A SHARE IN YOUR ESTATE (residuary legacy): I give all/ a share of (please state fraction/ percentage) of the residue of my estate absolutely to Veterans at Ease of Alington House, 4 North Bailey, Durham DH1 3ET, Registered Charity Number 1140832, to be applied by Veterans at Ease for its charitable purposes.

FOR A SPECIFIC SUM (pecuniary legacy): I give Veterans at Ease of Alington House, 4 North Bailey, Durham DH1 3ET, Registered Charity Number 1140832, absolutely, the sum of (amount in figures, amount in words) to be applied by Veterans at Ease for its charitable purposes

FOR A SPECIFIC ITEM: I give to Veterans at Ease of Alington House, 4 North Bailey, Durham DH1 3ET, Registered Charity Number 1140832, absolutely, (write in here whatever you wish to give) to be applied by Veterans at Ease for its charitable purposes.

If you have any questions please feel free to contact our Durham office. Any discussion will be considered confidential.

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